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ABSTRACT

This training manual is intended for use by higher education institutions that use the electronic student financial aid packaging process in a Windows environment. Each unit in the manual is organized into several lessons; each lesson presents the material and then provides practical application materials. The first unit is an overview of the EDExpress Packaging system. The second unit covers system setups, and includes lessons on the user database, various types of documents and document tracking procedures, budgets, fund maintenance, and award methodology. Unit 3 covers managing data, and Unit 4 covers document tracking. Unit 5 covers working with student awards and includes lessons on validating packaging data and creating and modifying financial aid packages. Unit 6 covers EDExpress reports. Unit 7 offers 13 advanced exercises that help the user apply the lessons learned in prior units. Five appendixes cover working with queries and provide blank worksheets, answer keys, sample user letters, and a quick reference section. (CH)

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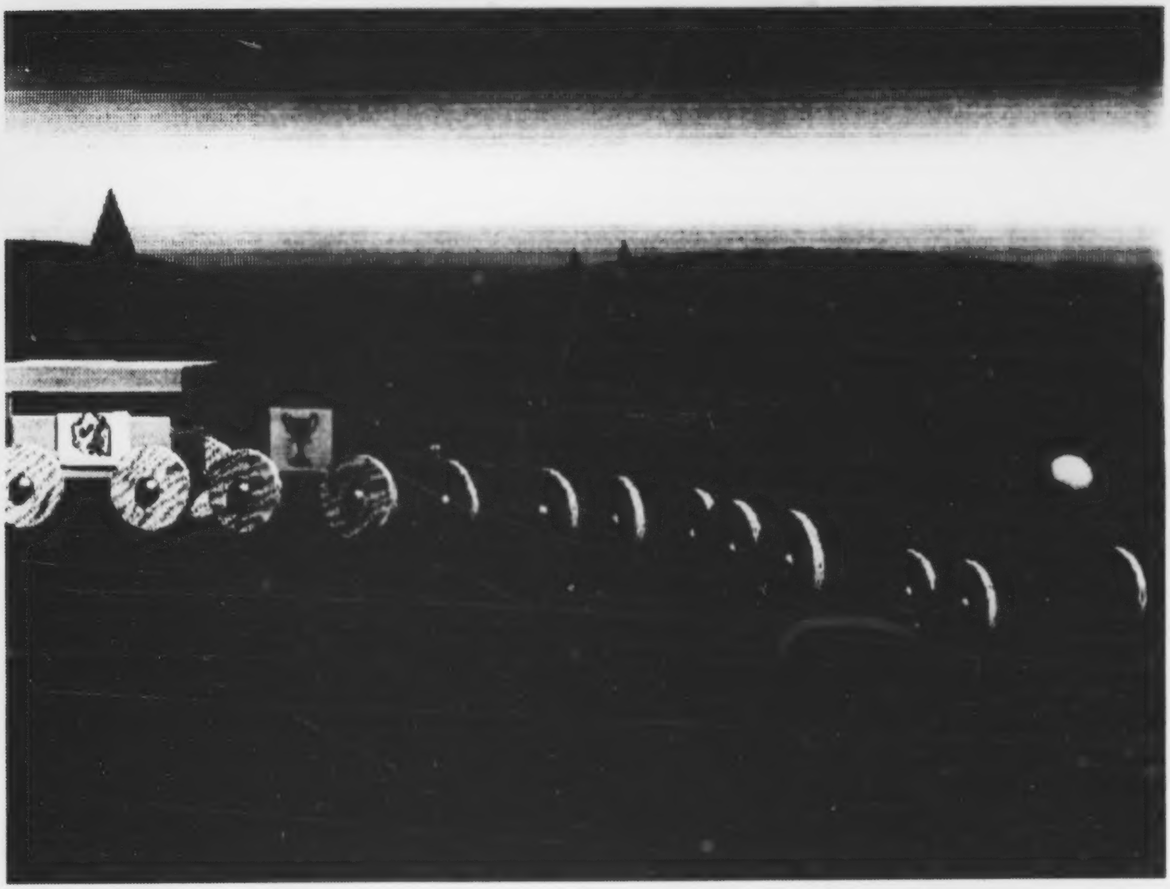
2000-2001 EDExpress



Packaging Training

HE 033 029

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UNITED STATES OF AMERICA

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Course ________________________________ Date __________

Location ________________________________

Trainer name(s) ________________________________

Your type of institution: ☐ Public ☐ Private ☐ Proprietary
☐ Undergraduate/Graduate ☐ Clock Hour/Credit Hour

Length of time in financial aid related responsibilities: (years/months) ________

Please complete the following statements using the scale below:

1 = Unacceptable
2 = Poor/less than acceptable
3 = Moderate/Acceptable
4 = Good/More than acceptable
5 = Outstanding/Much more than acceptable
N/A = Not applicable/Unknown/No Comment

GENERAL

1. How well did this training meet your needs for improving your student aid operations?

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A

2. How well did this training meet the overall objectives stated at the beginning of the course?

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A

3. How well did the training announcement describe this training?

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A

TRAINING MATERIALS

4. How helpful were the case studies, charts and other graphic illustrations?

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A

5. Our goal is to provide accurate, clear and organized materials. How do you rate our materials?

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A

PRESENTATION

6. Please rate the presentation and/or slide show for clarity and accuracy.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ N/A

7. Was enough time devoted to trainee questions and exercises?

☐ Yes ☐ No

8. What suggestions do you have to improve the trainers' presentation?

TRAINING LOGISTICS AND MISCELLANEOUS

9. What additional training would you like us to provide?

10. What comments do you have about the workshop's location and training room?

ADDITIONAL COMMENTS AND SUGGESTIONS

You can now provide your comments on this or any other training session on our Training Information page at www.ed.gov/offices/OPE/announce/trng/ or by sending us an e-mail at **SFA_Training@ed.gov**

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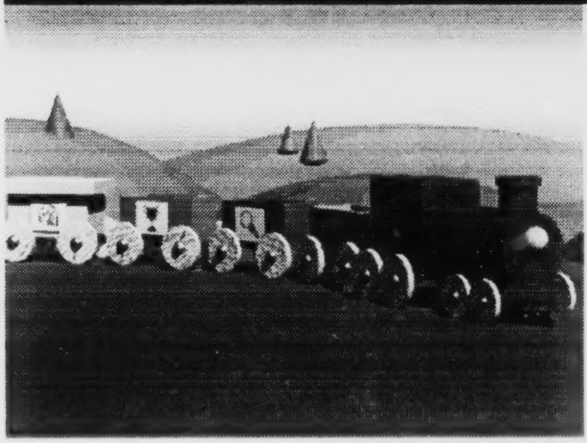
Unit 1



Packaging Overview

This overview introduces the concepts and benefits of electronic aid packaging and demonstrates how this system is integrated with EDExpress for Windows. Overviews of Online Help and the Query functions also are provided.

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Objectives

1. Understand the concept of electronic or automated financial aid packaging
2. Recognize the benefits of an automated financial aid packaging process
3. Become familiar with the five functions related to setting up and managing an automated financial aid packaging system using the EDExpress Packaging module
4. Recognize the features of the EDExpress Packaging module
5. Become familiar with EDExpress Online Help
6. Become familiar with working with queries

[Slides 1-4 and 1-5]

Financial Aid Packaging

Financial aid packaging is the process of awarding or allocating financial aid funds or resources to students. Typically, a student's financial aid package consists of several financial aid awards from different funding sources. However, it is possible for a package to consist only of a single award.

Some terms commonly used to reference awarding or allocating financial aid funds include:

- Algorithm
- Award methodology
- Funding formula
- Packaging philosophy

EDExpress Packaging uses the term award methodology. An award methodology is a formula that determines how financial aid funds are going to be allocated to students who meet an established profile (or defined criteria).

No matter what terminology your particular institution uses in packaging financial aid funds, the procedures you use for awarding federal funds must be documented in writing.

[Slide 1-6]

Electronic Financial Aid Packaging

Although financial aid packaging is often done manually, one student at a time, the manual process is time-consuming and not very efficient. Electronic aid packaging is an automation of the manual process. Note that the terms "electronic" and "automated" are used synonymously in discussions of financial aid packaging.

Using a software product or mainframe program, such as EDExpress, a third-party system, or something developed by your own staff, electronic aid processing automatically applies your school's award methodology to one or all of your students to package or award aid from the source(s) and in the amount(s) specified by the methodology.

[Slides 1-7 and 1-8]

Benefits of Electronic Aid Processing

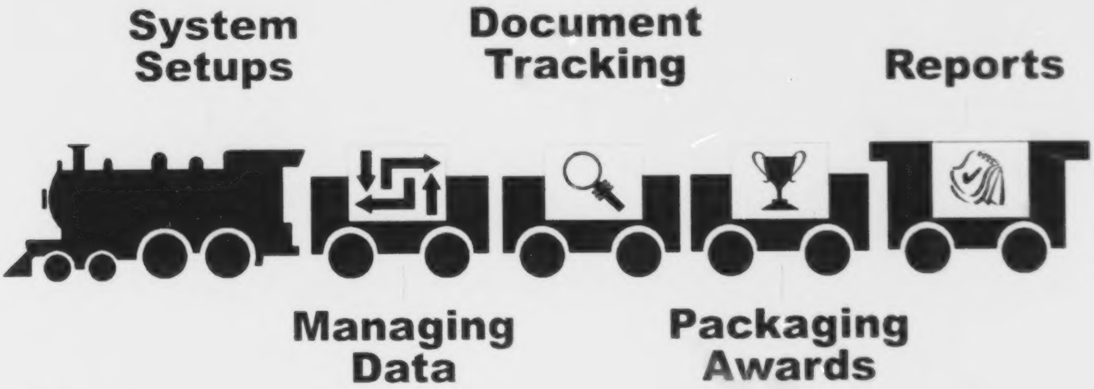
To become familiar with the benefits of electronic aid processing, let's compare components of a manual process to those of an electronic packaging process in the table on the following page.

[Slide 1-9]

Task	Manual Process	Electronic Process
Academic Year	• Review and document student's academic progress • Review ISIR for comment codes/problems	• Automatically documents with external import • Automatically documents with ISIR import
Budget	• Review student's program of study, planned enrollment, and housing • Calculate budget and document	Automatically assigns and documents based on criteria set up in software
Need	Subtract EFC from budget and document	Automatically calculates and documents
Package Single Student	• Using Pell table, determine if student is Pell eligible • Select award methodology based on information in file • Review fund balances • Document/record awards	Automatically applies correct award methodology based on defined criteria, reviews fund balances, awards funds, and documents/records the student's package
Package Multiple Students	N/A	Applies same process for single student to all eligible students at once
Track Documents	• Review individual student files for documents needed • Generate and print individual letters • Using tickler system, generate and send out individual follow-up letters • List documents being tracked • Update document lists as documents are received • Review/update award packages	• Automatically tracks the request and receipt of documents required based on established criteria • Automatically generates tracking letters for a group of students specified by criteria defined in a query • Repackages awards for a group of students selected by criteria defined in a query
Repackage Student(s)	Based on changes to the student's financial data, the award methodology, or fund parameters, repeat packaging process—one student at a time	Automatically recomputes the financial aid package(s) for an individual student or groups of students selected by criteria defined in a query
User-defined Letters	• Review student files—one at a time • Generate and print individual letters	Generates and prints a letter for an individual student or a group of students selected by criteria defined in a query
Reports	• Review individual student files • Add requested information to a list • Calculate totals	• Select report type and criteria • Automatically generates list and totals • Uses queries to select specific records

5-Function EDExpress Packaging System

The EDExpress Packaging Module is integrated with other EDExpress functions, such as the App Express and Direct Loan Modules. However, it also can be used as a stand-alone product. This packaging module can be defined by five relatively seamless functions that allow schools to track documentation, create award packages, maintain established fund balances, create award and document tracking letters, and generate system-defined reports.



[Slide 1-10]

1. System Setups

Defines the components and parameters of both your institution and its award methodology.

- Global system setup
- User-defined database
- Document tracking
- User-defined text
- Packaging system setup
- Academic year profile
- Budgets
- Award funds
- Award methodology
- Satisfactory Academic Progress (SAP) values
- User-defined formulas

[Slide 1-11]

2. Managing Data

Creates packaging records using three methods:

- Manual entry
- ISIR imports
- External data imports

[Slide 1-12]

3. Document Tracking

Tracks documents and generates tracking letters. Adds documents to student records using three options:

- Manual entry from an open student record
- Add Documents process to automatically assign documents to multiple student records
- Multiple Entry process to automatically assign documents or update the status of a document for multiple student records

[Slide 1-13]

4. Working with Student Awards

Packages, repackages, or unpackages financial aid awards for an individual student or a group of students selected by criteria defined in a query using two methods:

- Manual packaging
- Automatic packaging

[Slide 1-14]

5. Reports

Provides several system-defined reports to assist with financial aid management:

- Funds Maintenance
- Packaged Students by Fund Code
- Packaged Students
- Unpackaged Students
- Entered Packaging Records
- Packaging Setup
- Packaging Record
- Measurement Tools
- FISAP – Eligible Dependent Students
- FISAP – Eligible Independent Students

[Slide 1-15]

Flexible Features of EDExpress Packaging Module

- Can be a stand-alone product or integrated with other EDExpress modules
- Can both import and export data
- Can create user-defined data, user-defined letters, and user-defined formulas
- Can create award methodologies that specify the criteria students must meet to receive specific award packages
- Can set up funds and track expenditures and balances
- Can print system-defined reports for preparing the FISAP, lists, and other reports according to selection criteria specified
- Provides a fund reconciliation utility to reconcile the amounts awarded to students with the funds
- Can use the Multiple Entry option to update groups of records at one time
- Can build queries based on any field in the Packaging record
- Can package and repackage a group of student records without having to open the records
- Can browse the Packaging database table
- Can create multiple academic year profiles to define varying periods of enrollment for which aid is packaged (terms and non-traditional calendars)

[Slides 1-16 through 1-18]

What's New in EDExpress Packaging for 2000-2001

1. Setup

- Includes a **Default Housing Code** option
- Academic Year Profile setup displays loan percentages for Subsidized Loans and Other Loans and distributes loans by percentage values across terms
- Academic Year Profile setup displays columns for FSEOG and Grants and distributes these grants by percentage values across terms
- Award Methodology setup includes a **Remaining Need** option that can override the Remaining Need values set in Fund Maintenance
- Fund Maintenance setup displays separate aid types for Federal Work-Study and Other Work-Study
- Aid type **W** is now Federal Work-Study only and aid type **Y** is for any other Work-Study programs
- Added **Parent Contribution** field option for User-Defined Formula setup

[Slides 1-20 and 1-21]

2. Packaging Process

- Pell Formula 6 considers the student's enrollment status before determining which Pell Payment Schedule to use in awarding funds
- Process function batch calculates values for User-Defined Formulas
- Process function batch adds budgets to Packaging records
- Packaging system offers the option to award specific amounts of a fund based on the amount of Remaining Need
- Packaging system awards Pell from the Low Tuition Assistance Pell Schedules for programs with low tuition costs
- Toolbar on the Awards tab now displays **Unpackage** and **Repackage** icons

[Slides 1-22 and 1-23]

3. Entry

- **Dependency Status** field on the Awards tab is display only, the value is taken from the Deomgraphic record
- Added **Print in Next Batch** option to the Award Letter dialog box accessed from the Awards tab
- Packaging record displays the **Parent Contribution** (PC)

[Slide 1-24]

4. Import

- Able to exclude the **Add Budgets?** option assigns budgets to student records during ISIR Data import
- New **Print Successfully Imported Funds?** option prints the Funds Imported Report when the import process is done
- Parent Contribution field is added to Packaging records when importing ISIR Data

[Slide 1-25]

5. Export

- Export process allows the user to select records to export based on the Export Status value displayed on the Packaging record

[Slid 1-26]

6. Print

- Enrollment status (other than Not Enrolled) for each term enrolled prints on the Award Letter
- Predefined Award Letter text is modifiable
- Modifications to the Award Letter text are tracked by EDExpress using the last User ID and date of the modifications
- Award Letter does not display a value lower than zero in the Remaining Need field
- School address is an optional print field on the Award Letter
- Can print a list of packaged records immediately after running a batch Package or Repackage process
- Award Letter does not print awarded funds having a zero value
- Can print a list of all funds successfully imported

[Slides 1-27 and 1-28]

EDExpress Online Help

While this training guide provides a thorough overview of not only the EDExpress Packaging module but also several other EDExpress functions, you may need additional assistance at times. EDExpress Online Help is a great resource, and you already may be very familiar with it. If not, review the following.

Help topics are organized into main categories. The number of categories available to you depends on the version of EDExpress you're using as well as what modules you've installed. As modules and functions are added, so are corresponding Help topics.

Online Help is available by several methods:

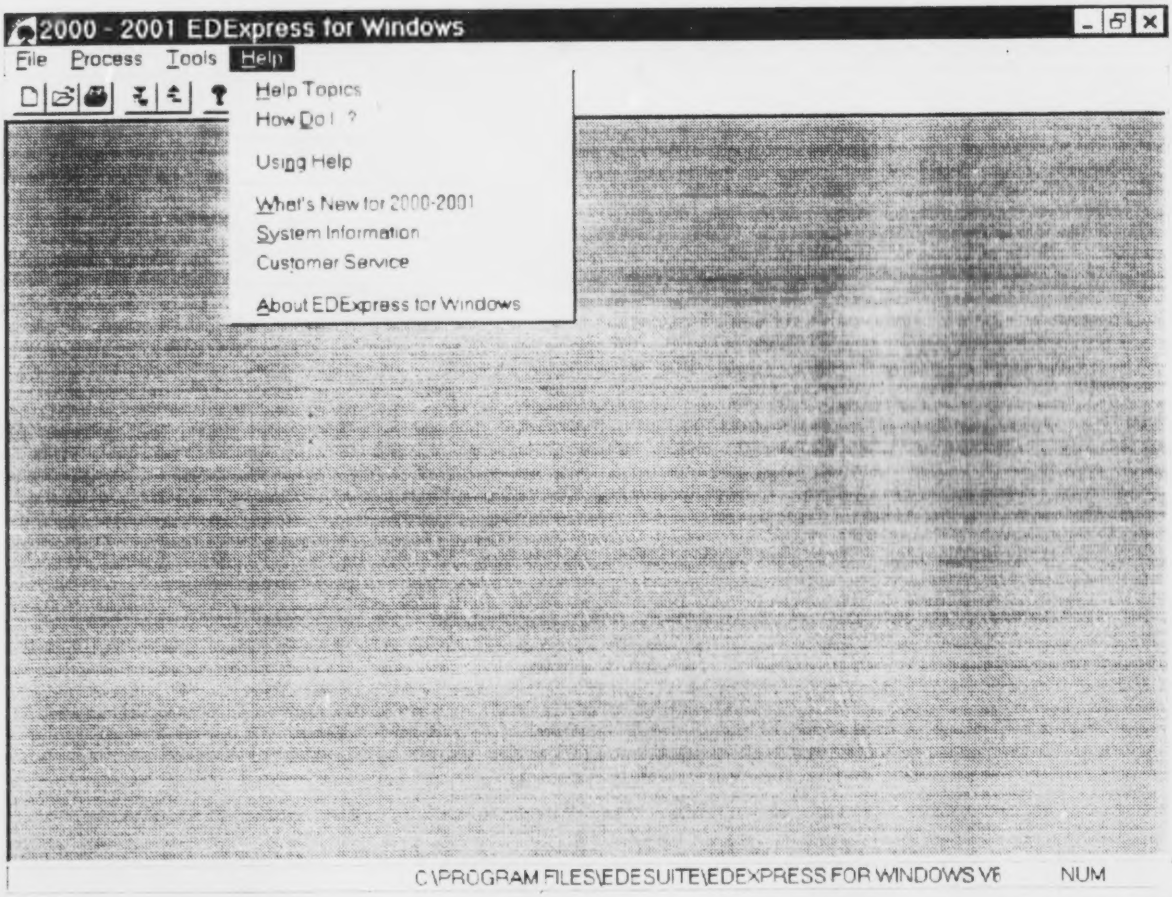
- Option on the EDExpress main toolbar menu
- Help button in dialog boxes (Dialog boxes appear when you perform various processes; they display or request information and prompt you to respond.)
- Option on the toolbar menu of an open student record
- F1 function from an individual data field within an open student record

Depending on the toolbar menu from which you access Help, some or all of the following options display:

- Help Topics
- How Do I?
- Using Help
- What's New for 2000-2001

[Slides 1-29 through 1-31]

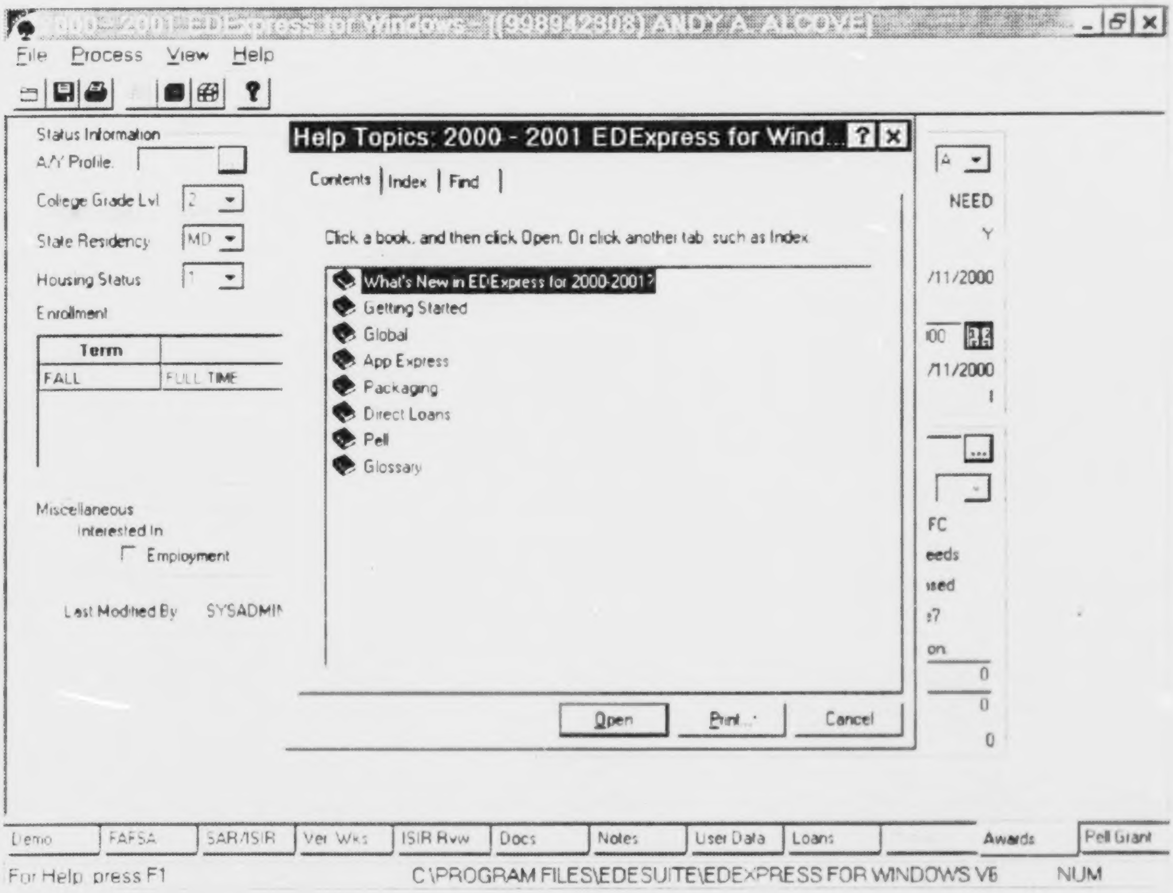
*Accessing **Help** options from the EDExpress main menu toolbar*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Help Topics
How Do I ?
Using Help
What's New for 2000-2001
System Information
Customer Service
About EDExpress for Windows
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

Accessing ***Help*** *from the menu toolbar within an open student record*

The options *Help Topics*, *How Do I?*, and *Using Help* are available from both the EDExpress main toolbar menu and from the menu toolbar within open student records. All have similar tabs that allow you to search for help by *Contents*, *Index*, and *Find*.

- **Contents** – Displays individual *books* for each category of information available
- **Index** – Displays an alphabetical list of EDExpress topics
- **Find** – Allows you to search for a topic you enter


2000 - 2001 EDExpress for Windows - [(998942808) ANDY A ALCOVE]

Help Topics: 2000 - 2001 EDExpress for Wind...

Click a book, and then click Open. Or click another tab, such as Index.

A/Y Profile:
College Grade Lvl: 2
State Residency: MD
Housing Status: 1

Term	
FALL	FULL TIME

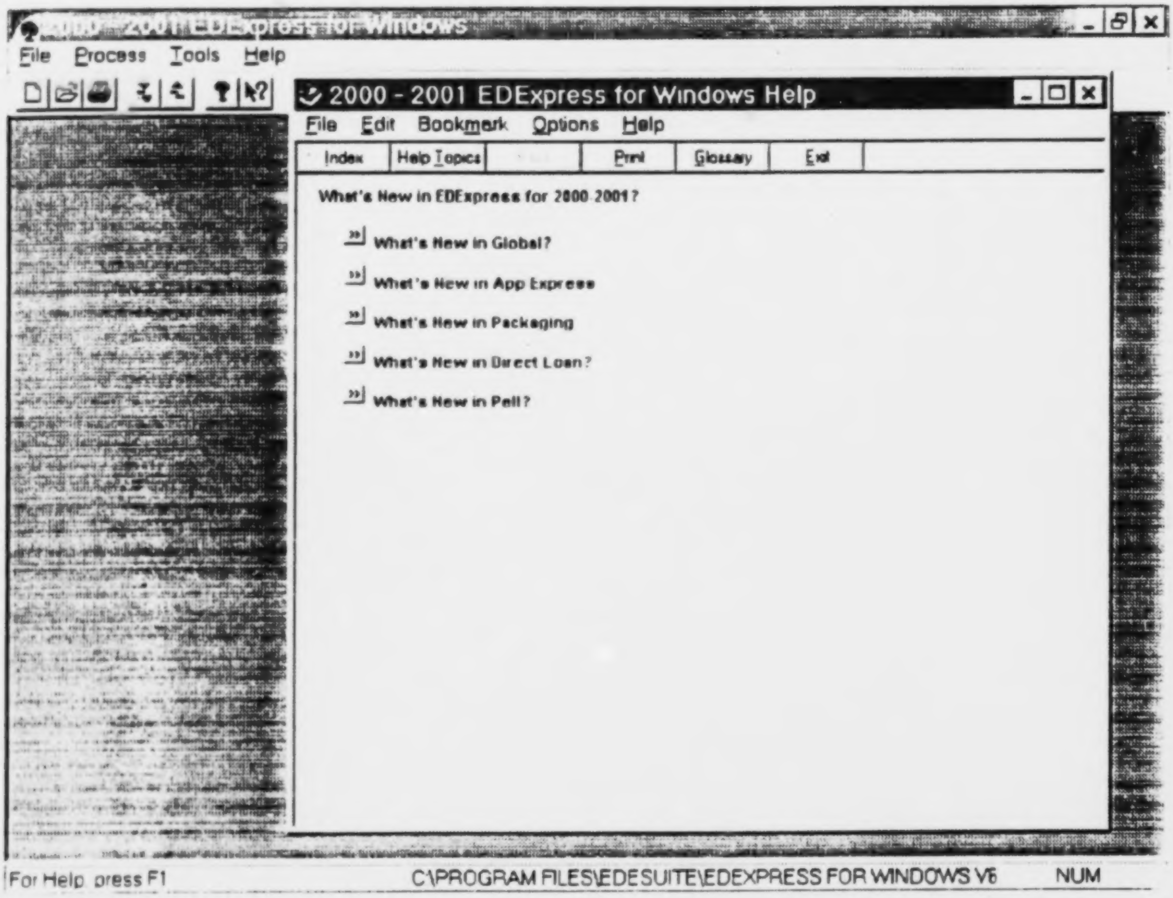
Last Modified By: SYSADMIN

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6 NUM

File
Process
View
Help
Status Information
Enrollment
Miscellaneous
Interested In
☐ Employment
Contents
Index
Find
What's New in EDExpress for 2000-2001?
Getting Started
Global
App Express
Packaging
Direct Loans
Pell
Glossary
Open
Print...
Cancel
NEED
Y
/11/2000
/11/2000
FC
eeds
ised
on
0
0
0
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Loans
Awards
Pell Grant

The *What's New for 2000-2001* option is available only from the EDExpress main toolbar menu. This option provides a complete listing, along with individual descriptions, of new features for any EDExpress module you've installed.

Accessing ***What's New for 2000-2001*** *from the EDExpress main menu toolbar*

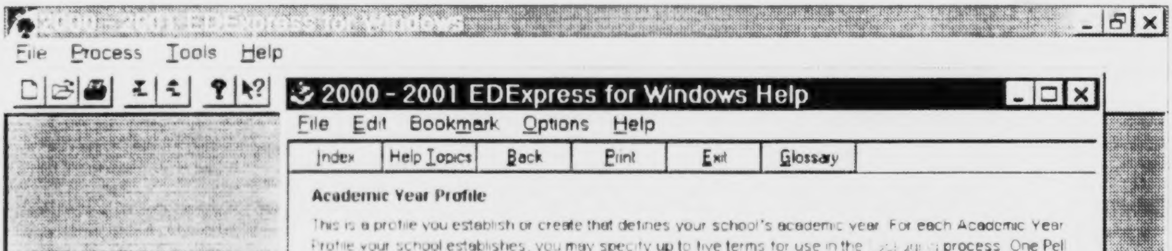

2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
2000 - 2001 EDExpress for Windows Help
File
Edit
Bookmark
Options
Help
Index
Help Topics
Print
Glossary
Exit
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

What's New in EDExpress for 2000-2001?

- **What's New in Global?**
- **What's New in App Express**
- **What's New in Packaging**
- **What's New in Direct Loan?**
- **What's New in Pell?**

Printing Help text

Because many Help topics contain a lot of text, you may find it easier to read the text on a printed page. Once you find the information you're searching for, EDExpress allows you to print the Help text displayed.


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
2000 - 2001 EDExpress for Windows Help
File
Edit
Bookmark
Options
Help
Index
Help Topics
Back
Print
Exit
Glossary
For Help, press F1
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Academic Year Profile

This is a profile you establish or create that defines your school's academic year. For each Academic Year Profile your school establishes, you may specify up to five terms for use in the packaging process. One Pell Grant formula must be defined for the Academic Year Profile. For each of the terms within the profile, you may indicate enrollment status and aid source percentages. You are also required to define a code and title for each Academic Year Profile. The code is the key to the profile and appears on the Packaging record.

If you have several classes starting each year, you can create an Academic Year Profile for each one. Or, if you have programs of various lengths, you can create separate Academic Year Profiles for each program. The Academic Year Profile is designed to provide maximum flexibility within the database.

You may designate one of the Academic Year Profiles as the default profile that will be assigned to Packaging records. You cannot delete or edit an Academic Year Profile that has been assigned to at least one student. However, you may delete or edit a profile that has not been assigned to a student.

Related Topics

» Academic Year Profile Setup dialog box

How Do I...?

» Set Up Academic Year Profile

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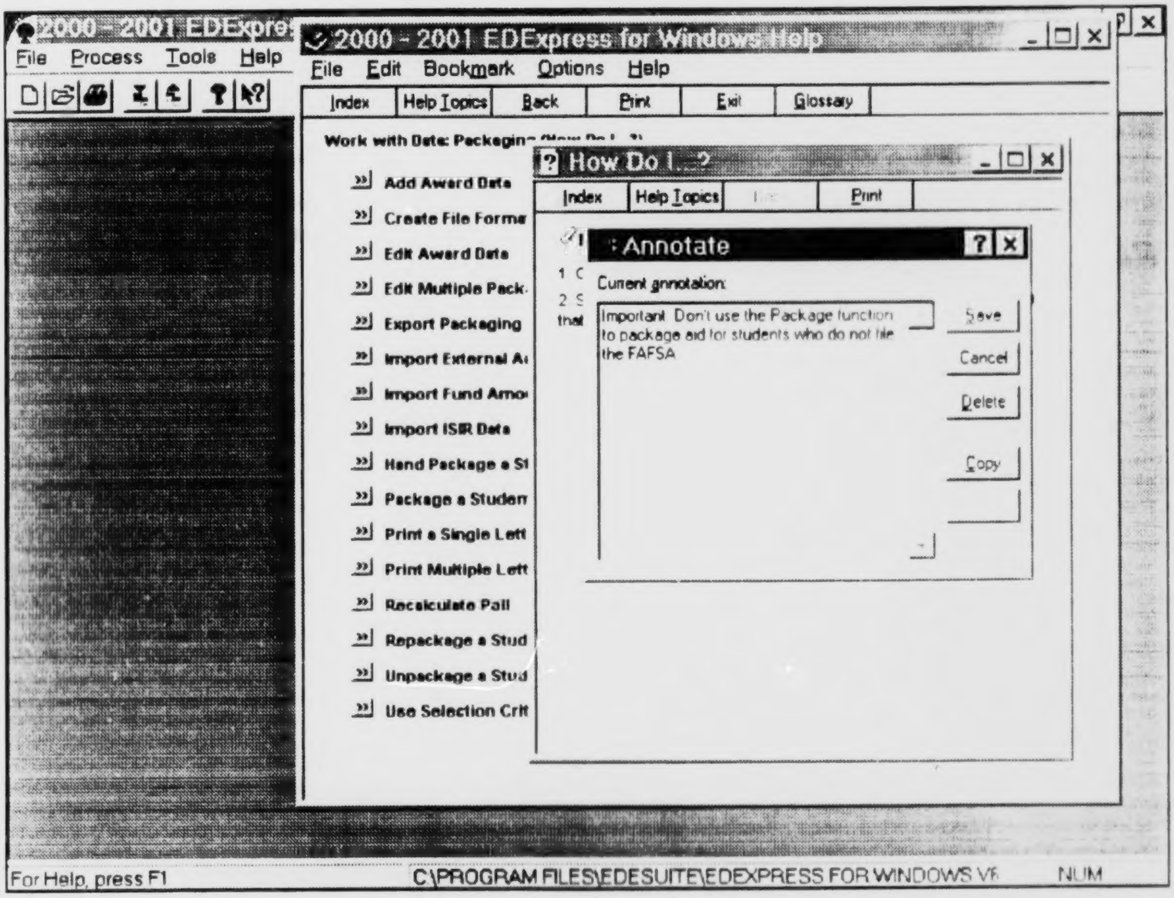
Annotating or customizing Help text

In addition, you can use the *Annotate* function to customize the text by adding your own comments, which can be changed or deleted at any time. You can identify customized Help text that has been saved by the paperclip icon that displays just before the title of the topic.


2000 - 2001 EDExpress
File Process Tools Help
2000 - 2001 EDExpress for Windows Help
File Edit Bookmark Options Help
Index Help Topics Back Print Exit Glossary
Work with Data: Packaging
Add Award Data
Create File Forma
Edit Award Data
Edit Multiple Pack.
Export Packaging
Import External A
Import Fund Amo
Import ISIR Data
Hand Package a St
Package a Studen
Print a Single Lett
Print Multiple Lett
Recalculate Pell
Repackage a Stud
Unpackage a Stud
Use Selection Crit
How Do I...?
Index Help Topics Print
Annotate
Save
Cancel
Delete
Copy
For Help, press F1
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Current annotation:

Important. Don't use the Package function to package aid for students who do not file the FAFSA

Working with Queries

The goal of the EDExpress Packaging module is to have the software automatically perform as many steps of the packaging process as possible. A query is a great tool to assist you in selecting records needed for performing various functions, such as packaging funds, assigning budgets, assigning documents, printing letters, and reports.

A query is a logical statement or predefined set of criteria that describes or selects a particular student population from all the records in the database. Queries are created in specific modules to perform specific functions. When working with Packaging functions, you'll routinely use queries from the Global, Packaging and Apps modules.

[Slide 1-32]

Task	Module Where Query Is Created
Add Budgets (Process function)	Packaging
Assign Budgets (Multiple Entry function)	Packaging
Assign Award Methodology	Packaging
Assign Fund	Packaging
Add Documents (Process function)	App Express
Assign Documents (Multiple Entry function)	Global
Import ISIR data into Packaging to create packaging records	App Express
Print Award Letters	Packaging
Print Document Tracking Letters	Global
Print User Letters	Global

[Slide 1-33]

Rules for Building Queries

The standard Query Language tool in EDExpress creates simple logical selection statements. When you build a query some basic rules apply:

- Carefully think through how you intend to use the query. Each EDExpress module (Global, App Express, Packaging, Direct Loan, and Pell) performs different functions. At the same time, each contains a different set of data fields. You can't mix and match functions you want to perform in one module with queries that select data from fields in another module.

[Slide 1-35]

- Use an operator to describe a field or its relationship to a value. Valid operators include = (equal to), > (greater than), >= (greater than or equal to), < (less than), <= (less than or equal to), <> (not equal to), Like, and Not like.

[Slide 1-36]

- AND and OR are the only connectors used to join multiple query selection statements.

[Slide 1-37]

- AND means the conditions of **ALL** statements that have been joined or connected must be true for the query to select records

Example

Dependency status *D* **AND** *State of Residency* *VA* **AND** *Verification* *Y*

Processing from left to right, the software first checks the dependency status, then the residency, and finally the verification status Only records that meet criteria for all three statements are selected

- For statements joined or connected by OR, the query is true if the conditions of **ANY** of the statements joined are true

Example

State of Residency *VA* OR *State of Residency* *LA*

The software checks each statement (from left to right) Records meeting either criteria (VA OR LA) are selected

- You may create a complex query that uses both AND and OR by using parentheses to "nest" statements within each other

Example

((*State of Legal Residence* *VA*) AND (*EFC* *1000*)) OR (*State of Legal Residence* *IA*)

By placing a phrase within an extra set of parentheses, EDExpress looks at that part of the query statement first The results of this query would be a list of all students either from Virginia with an EFC of less than 1000 OR all students from Iowa

- Multiple query selection statements are processed from left to right or from beginning to end
- User-defined data fields that you create are valid fields across all of the EDExpress modules
- User-defined fields can be included in a query Queries with user-defined fields can use both the AND and OR connectors
- You can modify any field in the Query dialog box
- You can query for a federal school code that appears anywhere on the ISIR, including a specific school choice position
- EDExpress comes with a set of predefined queries commonly used in the Global, App Express, Packaging, Direct Loan, and Pell modules Predefined queries can be used as templates for creating new queries Just make whatever changes are needed, enter a new title, and save the new query

[Slide 1-39]

- Existing user-defined queries also can be used as templates to create new queries The original user-defined query can be modified without creating a new query
- A parameter query allows you to designate that you want to choose values each time you run the query Parameter queries are convenient if you query on the same fields regularly but want to use different values **Parameter queries cannot be used in any Packaging System Setups**

[Slide 1-40]

Constructing a Query

Use a Query Worksheet like the one on the following page to determine what records you want the query to select. Then, transfer the information to the software, using the following steps.

1. Select **Tools/Query** from the EDExpress menu bar.
2. Click the **tab** of the module you want to work in.
3. Click the **Add** button.
4. Enter a descriptive **Title** for the query.
5. Select a **field** from the Field list. (Type the first few letters of the field name to find field names that begin with those letters.)
6. Click the Operator **down arrow** to select an operator.
7. Enter a value for the field. Click the **Value Help** button to see the valid values for the field.

Note: If you want to be prompted for a value at the time you use the query, don't specify a value for the query statement. Instead, click the ***Prompt at Execution*** *checkbox to define the query as a parameter query.*

8. Click the **Append** button to add the query statement to the Criteria box.
9. To add another statement to the query, click the **AND** button or the **OR** button. Repeat steps 5-8 until you've added all statements for the query, then continue on to step 10.

Note: If this query includes both AND and OR statements, you must add parentheses to create nested statements.

10. To save the query click **Save**, then **OK**.
11. Click **OK** to close the Query dialog box, or click **Add** to create another query.

Query Worksheet

What Task do You Want to Perform?	What Module is Available to Create the Query to Perform this Task?
Assign verification documents to dependent students selected for verification	☒ Apps ☐ Global ☐ DL ☐ Packaging ☐ Pell

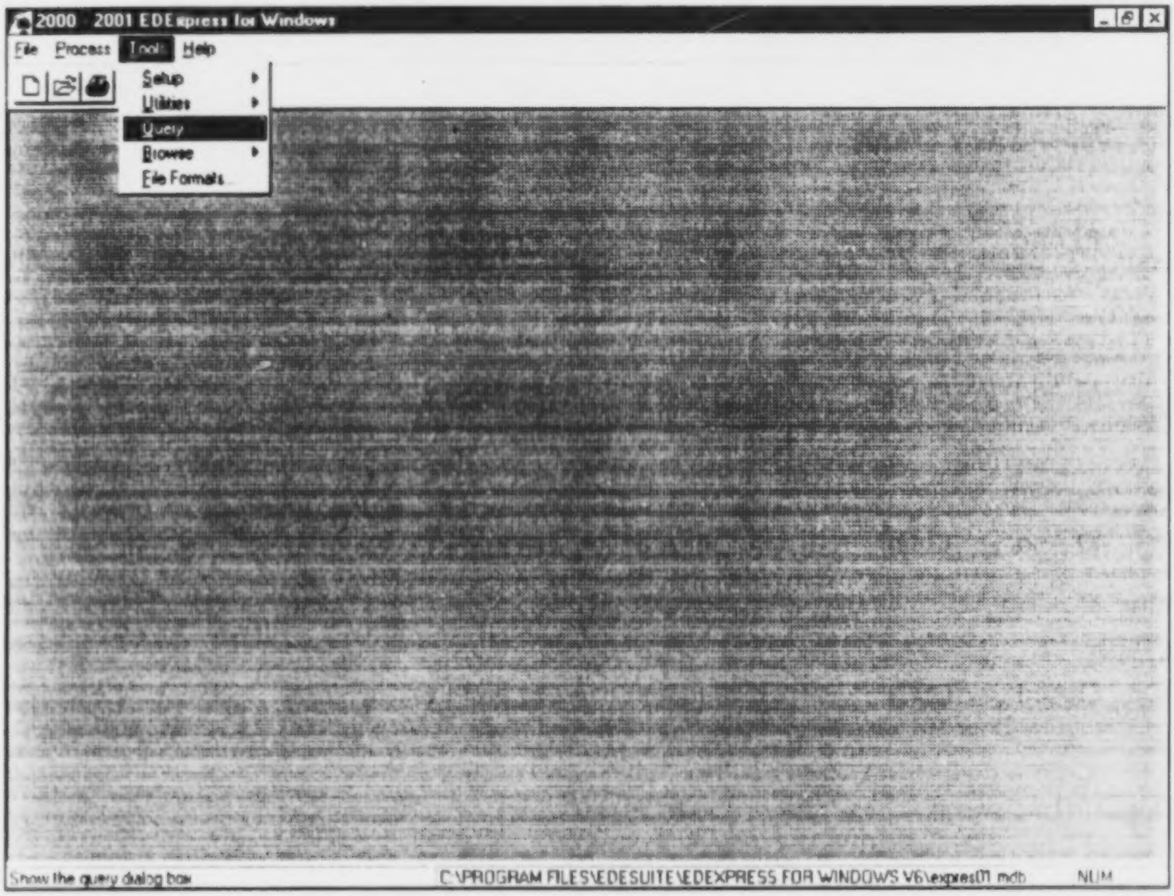
Enter a title for the Query that describes the group of students to be selected:
Selected for Verification - Dependent

Data Element	Operators	Value
Enter the data field(s) from the Module indicated above	=, < >, <, >, > =, < =, like, not like	☐ Prompt at Execution (to create a parameter query) ☒ Enter free-form or system-assigned value
	☐ Left (☐ Right)	
Verification Flag	**=**	**Y**
☒ And ☐ Or	☐ Left (☐ Right)	
Dependency Status	**=**	**D**
☐ And ☐ Or	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	

To create a new query

*Select **Tools/Query** from the main menu*

The following example demonstrates how to create a new query in the App Express database that identifies dependent students who are selected for verification. (Refer to the sample Query Worksheet on the previous page.)


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Setup
Utilities
Query
Browse
File Formats...
NUM

Show the query dialog box

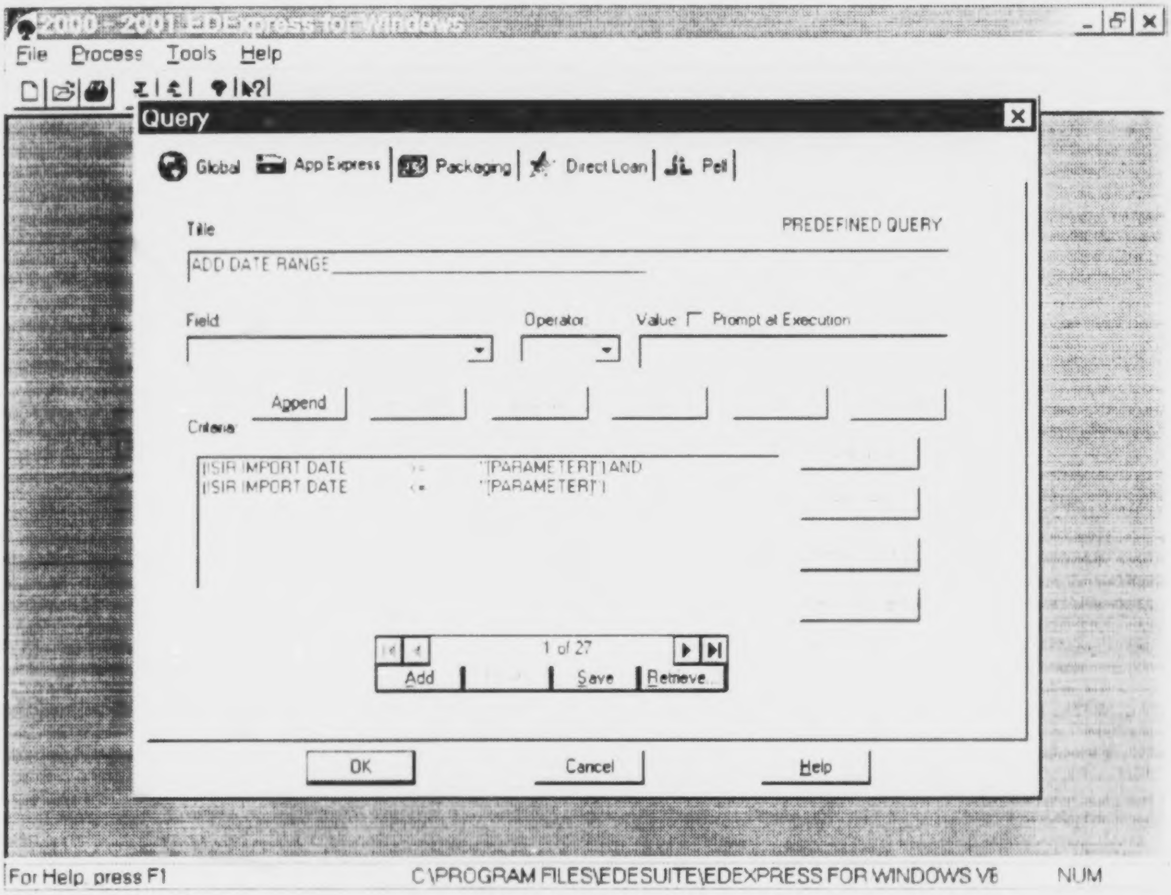
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

Note: Queries for performing document tracking tasks are created in the App Express module. Fields in the App Express module are based on ISIR data.

Click the ***App Express*** *tab*

The Query dialog box displays

Select ***Add*** *to begin a new query*


2000 - 2001 EDExpress for Windows
File Process Tools Help
Query
Global
App Express
Packaging
Direct Loan
Pell
Append
Add
Save
Retrieve...
OK
Cancel
Help

Title: ADD DATE RANGE

PREDEFINED QUERY

Field

Operator

Value ☐ Prompt at Execution

Criteria:

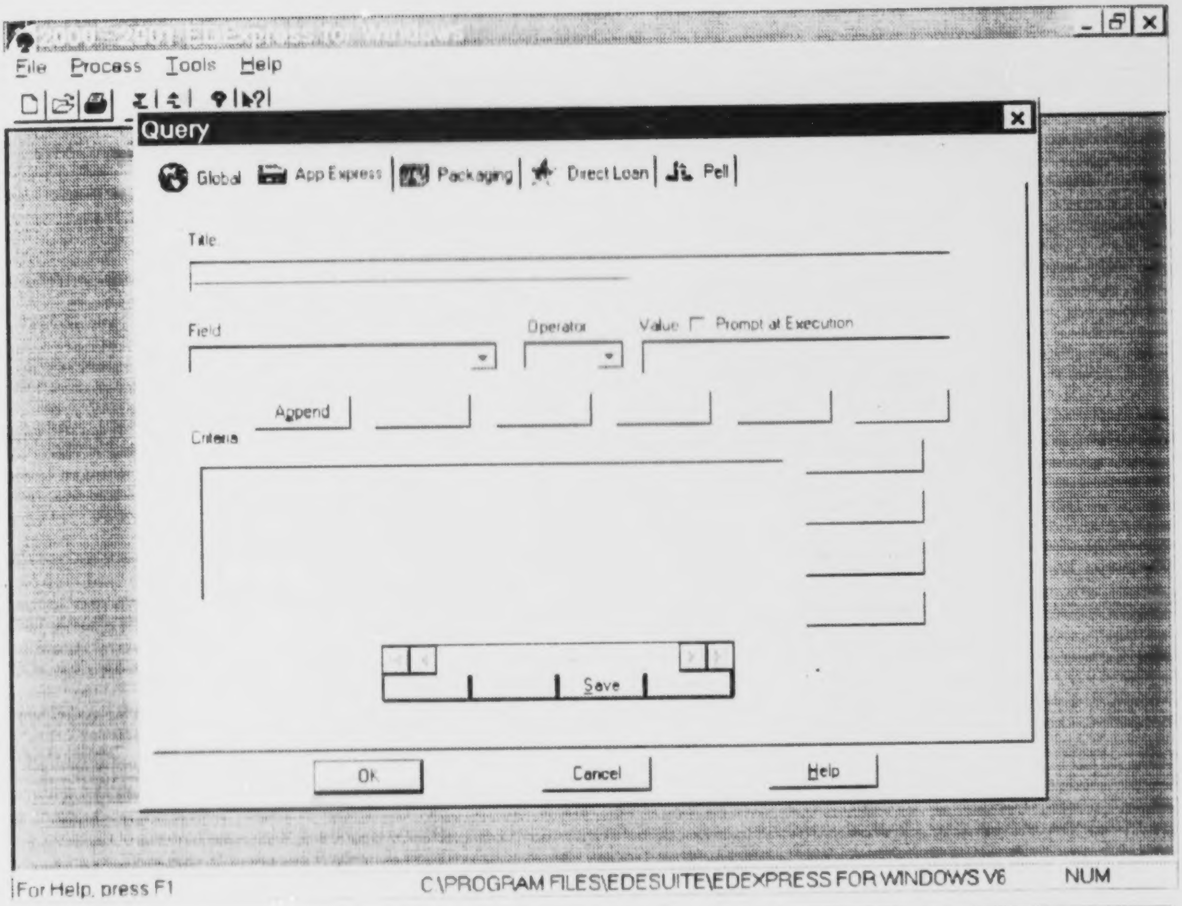
```
([ISIR IMPORT DATE         >=        "[PARAMETER]") AND
([ISIR IMPORT DATE         <=        "[PARAMETER]")
```

1 of 27

For Help, press F1   C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6   NUM

BEST COPY AVAILABLE

A blank page displays


2000-2001 EDExpress for Windows
File
Process
Tools
Help
Query
Global
App Express
Packaging
Direct Loan
Pell
Title
Field
Operator
Value
☐ Prompt at Execution
Append
Criteria
Save
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
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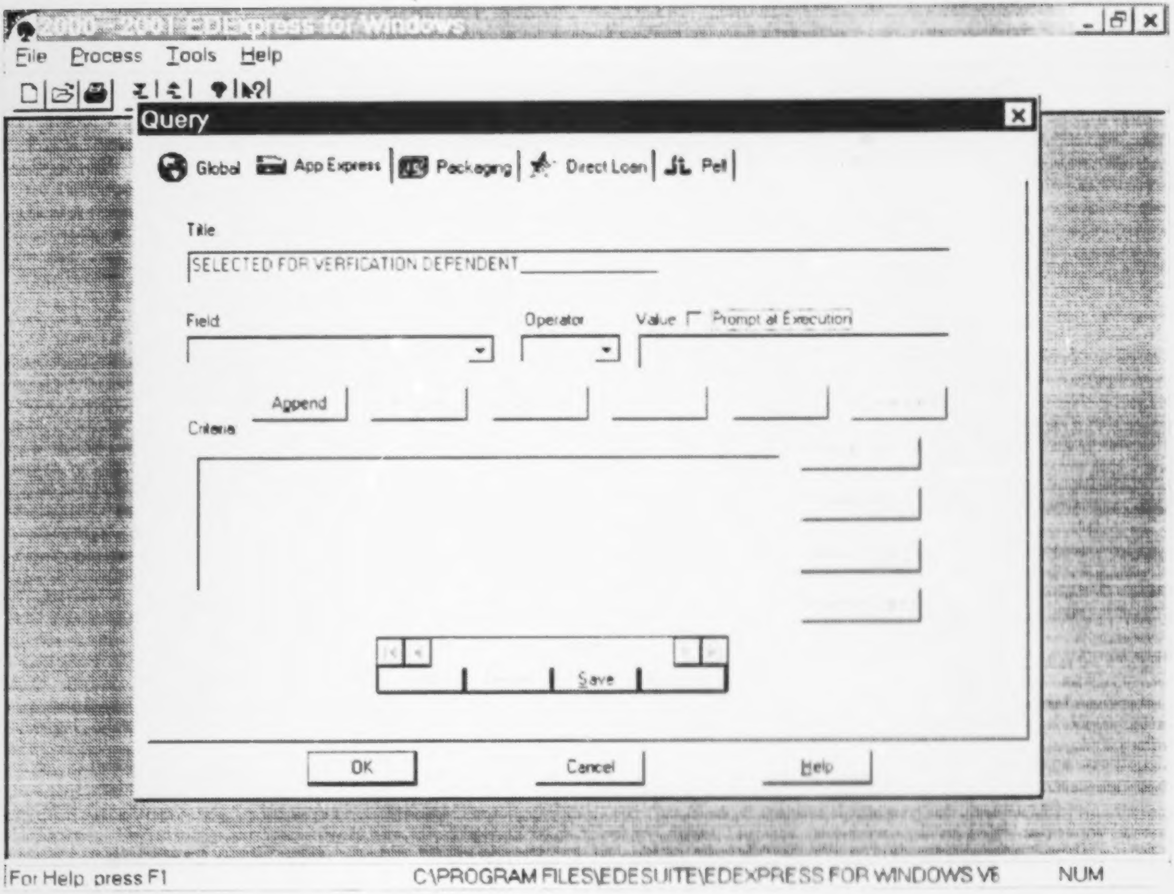
*Enter the **Title**—something descriptive that readily identifies the query*



Title: SELECTED FOR VERFICATION DEPENDENT

2000 - 2001 EDExpress for Windows
File Process Tools Help
Query
Global
App Express
Packaging
Direct Loan
Pell
Field
Operator
Value ☐ Prompt at Execution
Append
Criteria
Save
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
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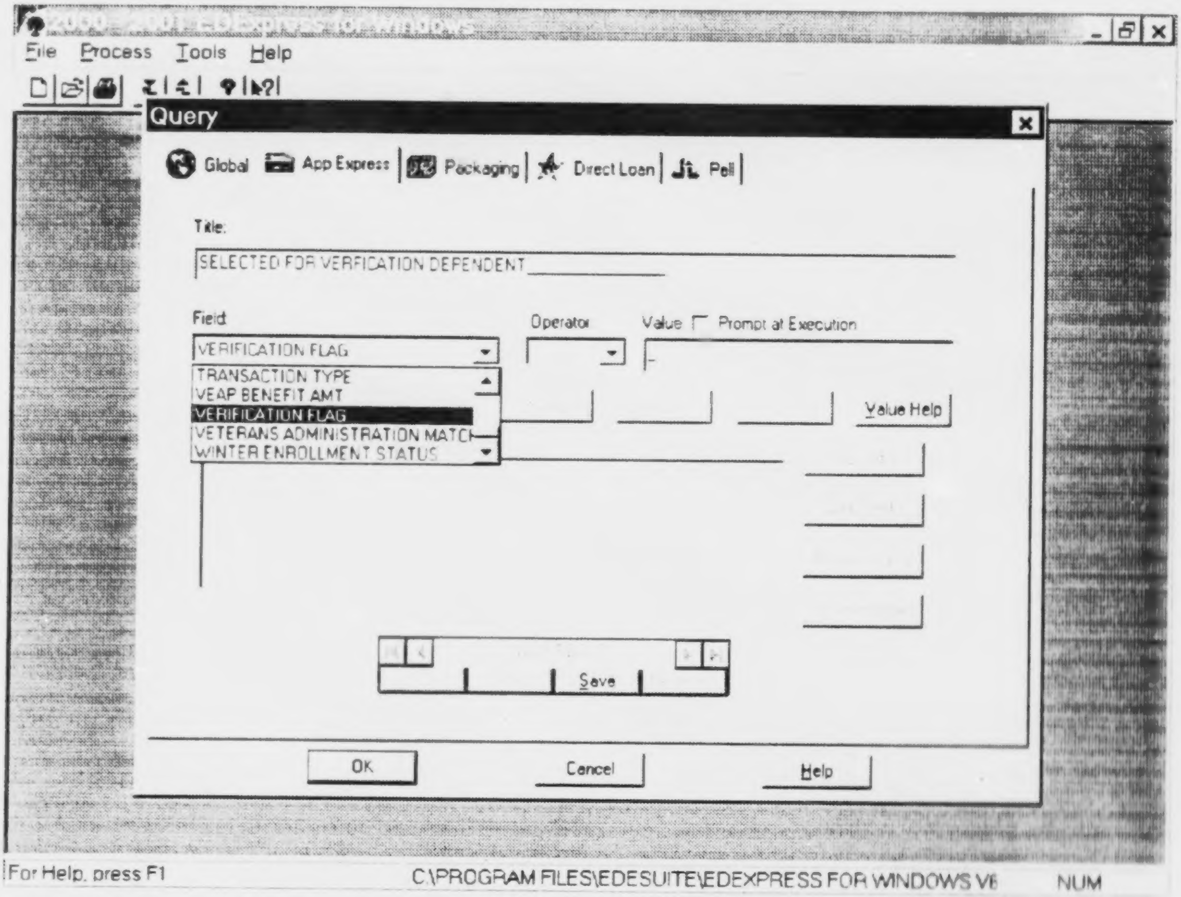
Click the ***Field*** *down arrow to see the list of available fields in App Express*

With the cursor, select the desired field (or enter the first few letters of the field name)

This query requires two selection statements. The first identifies records selected for verification.



Title: SELECTED FOR VERIFICATION DEPENDENT

Field: VERIFICATION FLAG

TRANSACTION TYPE
VEAP BENEFIT AMT
VERIFICATION FLAG
VETERANS ADMINISTRATION MATCH
WINTER ENROLLMENT STATUS

2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Query
Global
App Express
Packaging
Direct Loan
Pell
Operator
Value
☐ Prompt at Execution
Value Help
Save
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
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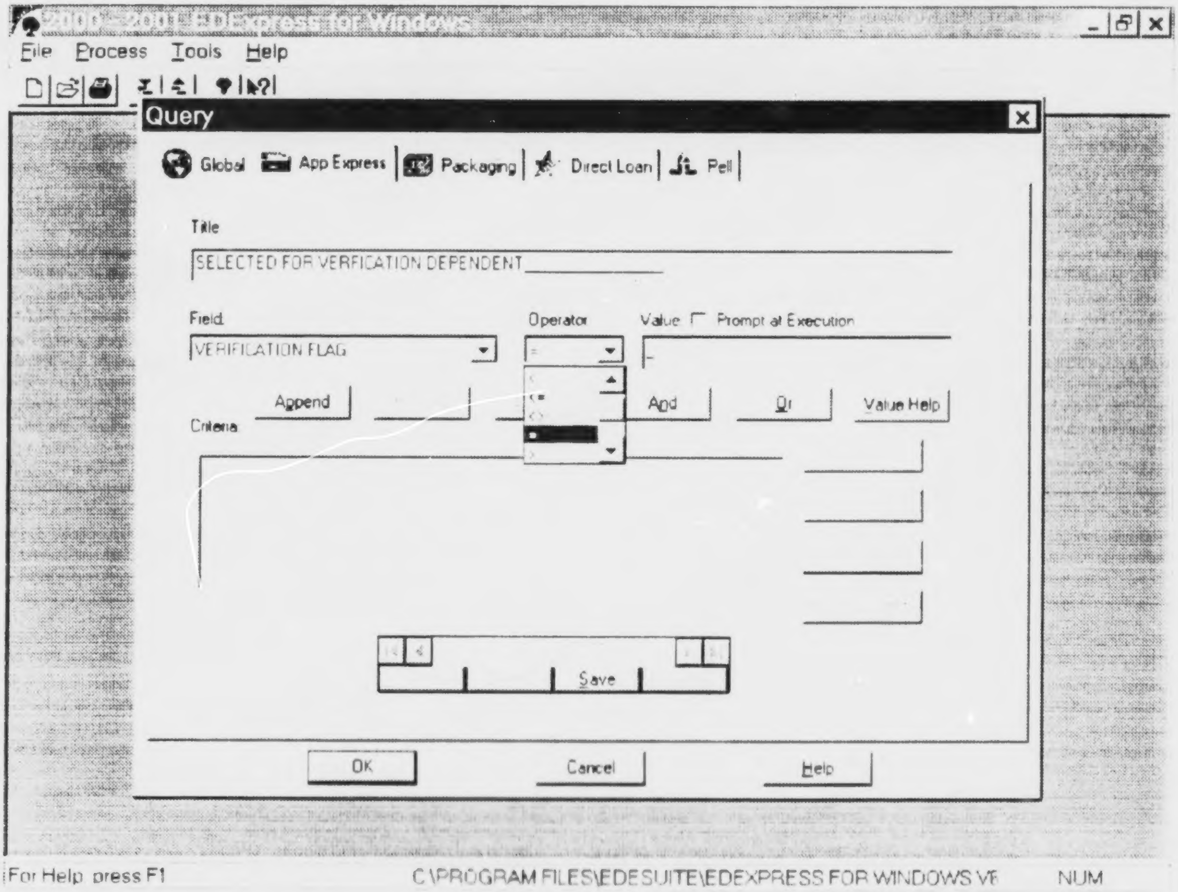
The operator in this example is "=." since we want to find records where verification flag "=" Y

Select the appropriate ***Operator*** *by clicking the* ***down arrow*** *to see the full list*

Tip: Whenever you construct a query based on ISIR comment codes, you must use the operators "Like" and "Not Like"


2000–2001 EDExpress for Windows
File
Process
Tools
Help
Query
Global
App Express
Packaging
Direct Loan
Pell
Prompt at Execution
<
<=
<>
=
>
Append
And
Or
Value Help
Criteria
Save
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS VE
NUM

Title: SELECTED FOR VERIFICATION DEPENDENT

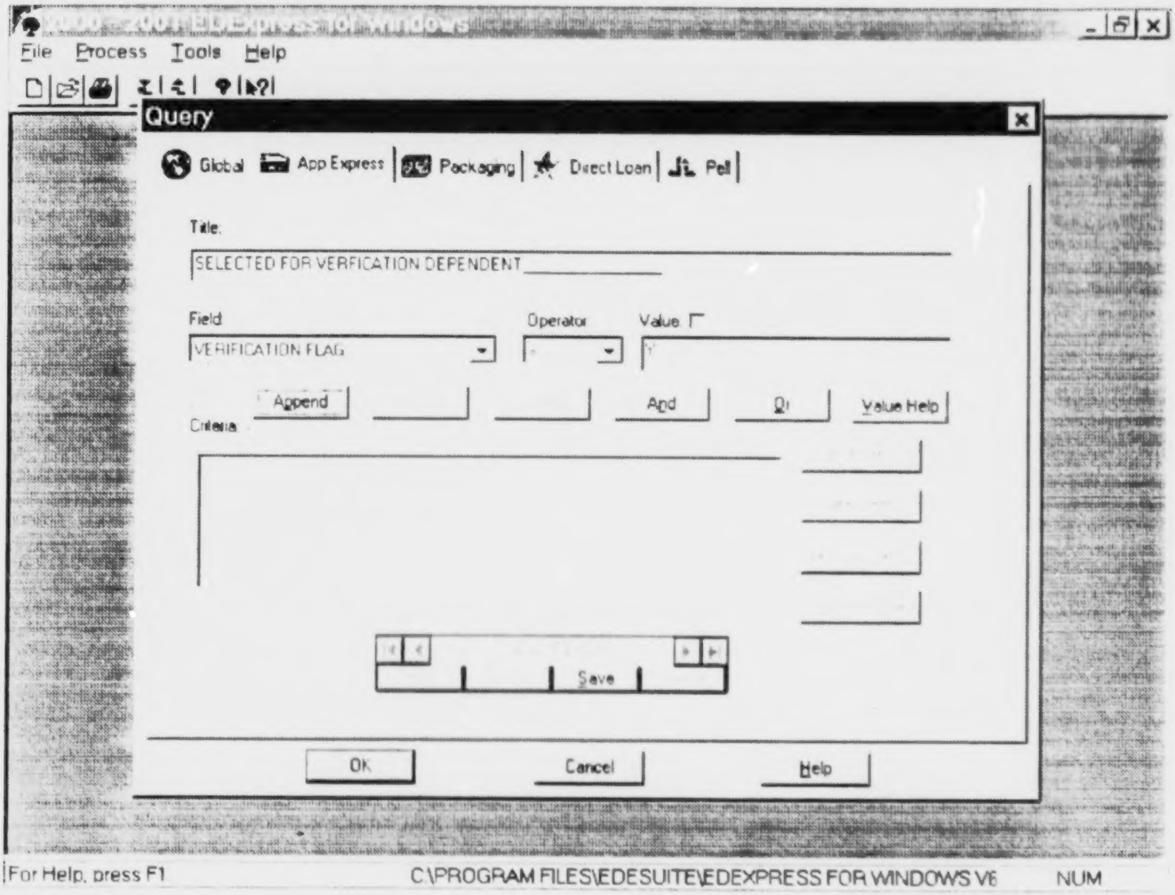
Field: VERIFICATION FLAG

Operator: =

Value: ☐ Prompt at Execution

*Enter the **Value** to be measured against the field you selected*

The value we want for Verification Flag is "Y"


2000 - 2001 EDExpress for Windows
File Process Tools Help
Query
Global
App Express
Packaging
Direct Loan
Pell
Append
And
Or
Value Help
Criteria
Save
OK
Cancel
Help

Title: SELECTED FOR VERFICATION DEPENDENT

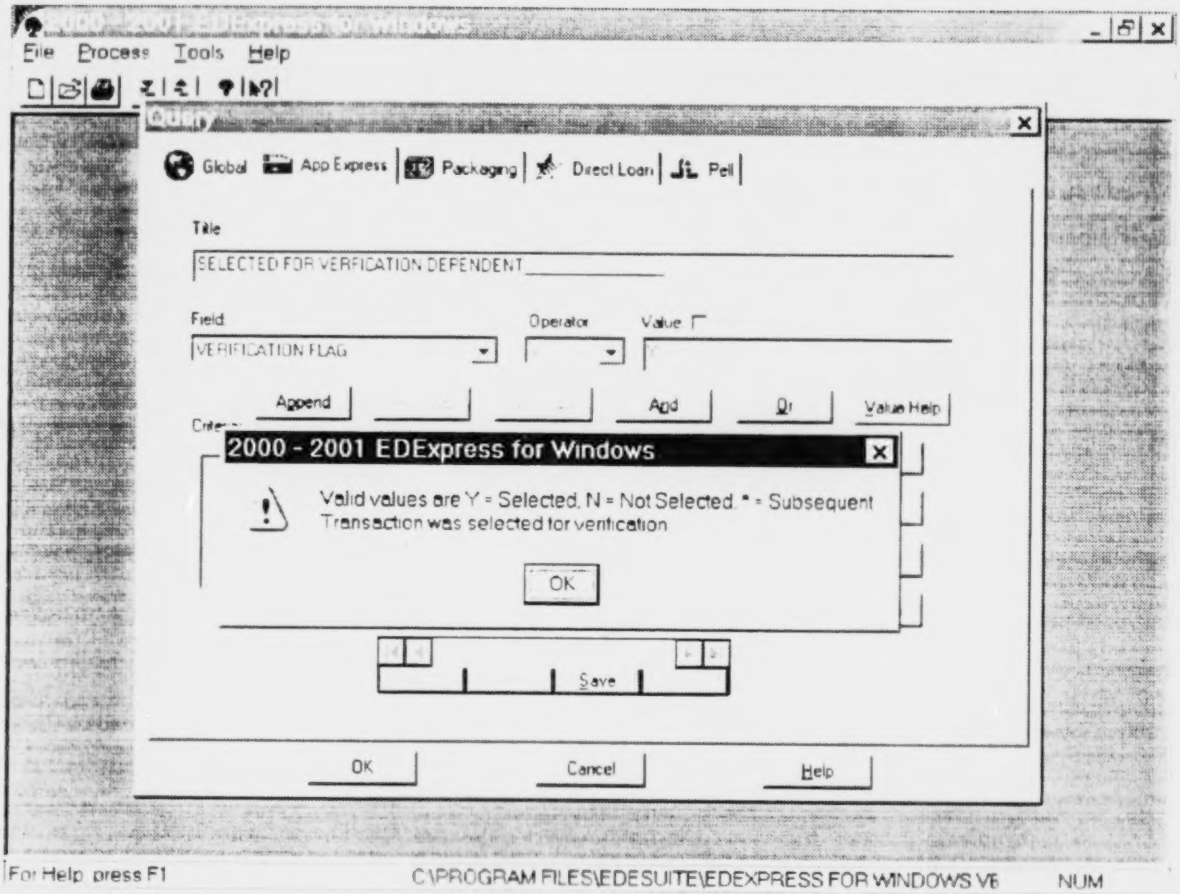
Field: VERIFICATION FLAG

Operator: =

Value: ☐ Y

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6 NUM

If you need help finding the correct value, click the ***Value Help*** *button. A list of all possible values displays.*



2000 - 2001 EDExpress for Windows
File Process Tools Help
Query
Global App Express Packaging Direct Loan Pell
Append Add Or Value Help
Criteria
Save
OK Cancel Help

Title: SELECTED FOR VERFICATION DEPENDENT

Field: VERIFICATION FLAG

Operator:

Value: Y

2000 - 2001 EDExpress for Windows

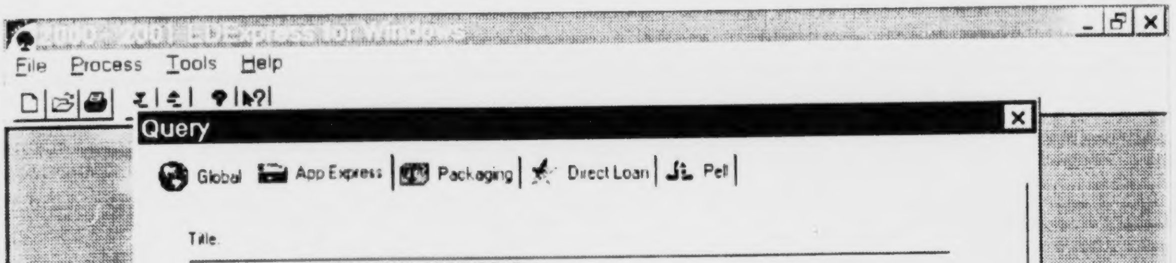
Valid values are Y = Selected, N = Not Selected, * = Subsequent Transaction was selected for verification

OK

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6 NUM

*Click the **Append** button to add the statement to the query*

*The **Remove** and **Change** buttons are now active*



2000-2001 EDExpress for Windows

Title: SELECTED FOR VERIFICATION DEPENDENT

Field: VERIFICATION FLAG

Criteria: [VERIFICATION FLAG = "Y"]

For Help press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6 NUM

File
Process
Tools
Help
Query
Global
App Express
Packaging
Direct Loan
Pell
Operator
Value
Append
Remove
Change
And
Or
Value Help
Save
OK
Cancel
Help

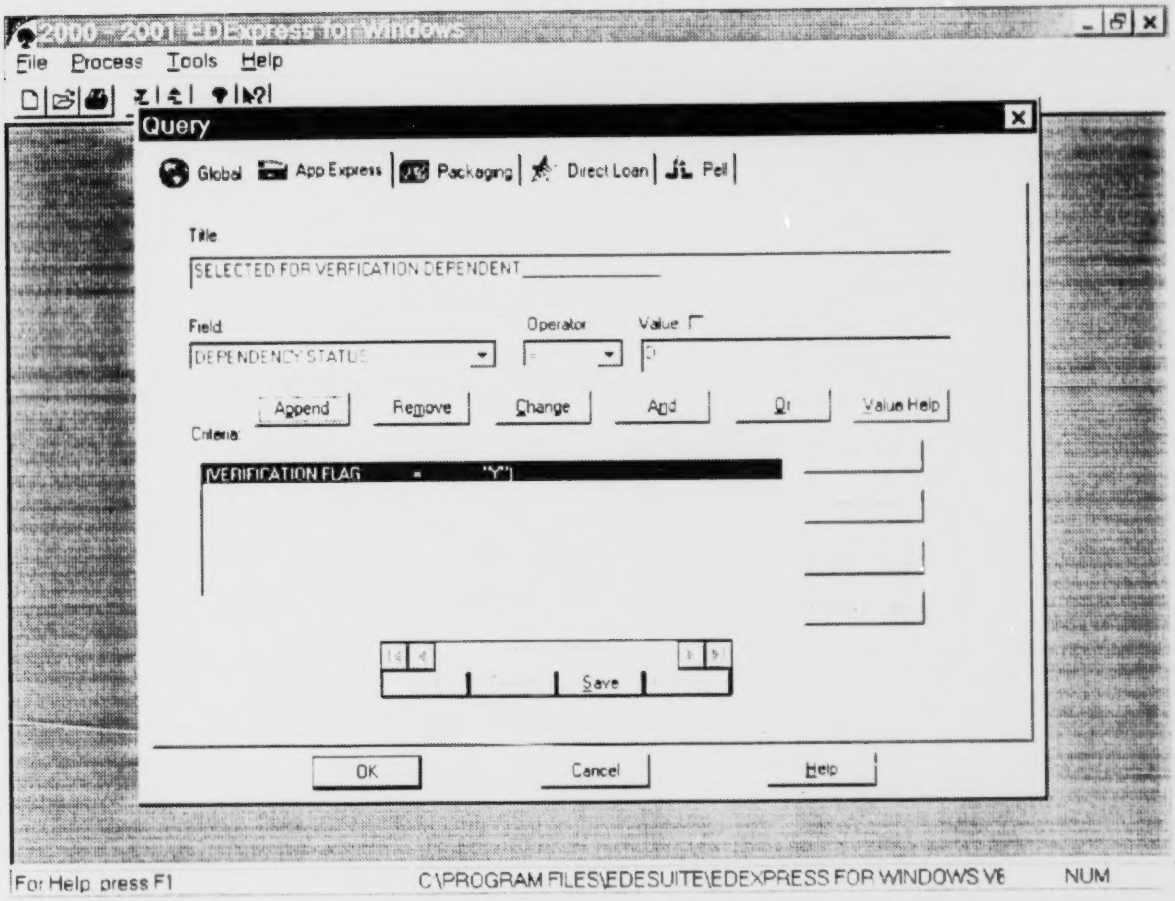
A second statement must be added to the query to select students selected for verification who also are dependent

Click ***AND***

Select Dependency Status for the ***Field***

Enter D for the ***Value***

Click ***Append*** *to add the second statement to the query*


2000 - 2001 EDExpress for Windows
File Process Tools Help
Query
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Packaging
Direct Loan
Pell
Append
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Change
And
Or
Value Help
Save
OK
Cancel
Help
For Help press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
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Title: SELECTED FOR VERIFICATION DEPENDENT

Field: DEPENDENCY STATUS

Operator: =

Value ☐: D

Criteria:

(VERIFICATION FLAG = 'Y')

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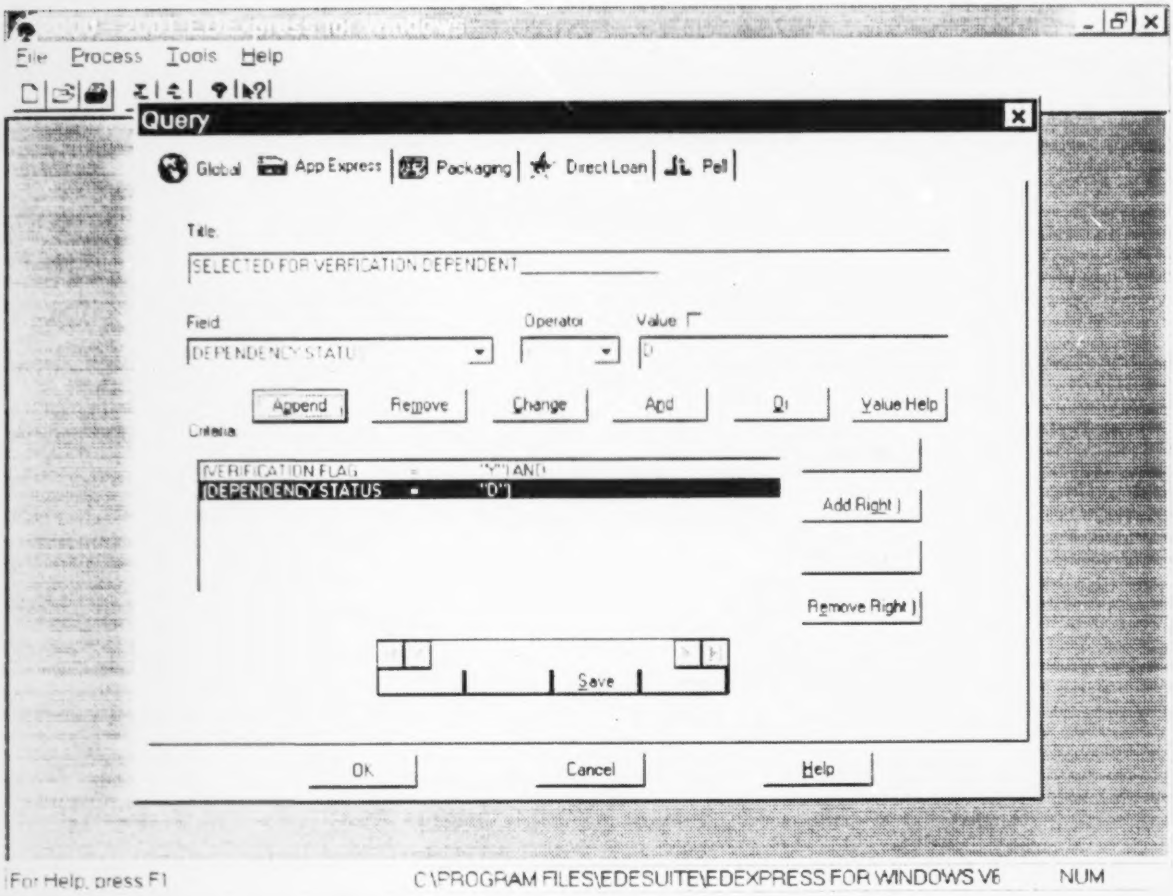
The ***Add Right)*** *and* ***Remove Right)*** *buttons are now active*

The completed query identifies students who are selected for verification and who are dependent


File Process Tools Help
Query
Global
App Express
Packaging
Direct Loan
Pell
Append
Remove
Change
And
Or
Value Help
Add Right)
Remove Right)
Save
OK
Cancel
Help
NUM

Title: SELECTED FOR VERFICATION DEPENDENT

Field: DEPENDENCY STATU

Value: D

Criteria:

```
(VERIFICATION FLAG      =        "Y") AND
(DEPENDENCY STATUS      =        "D"))
```

For Help, press F1   C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6

You can change any of the fields or values selected at any time

In this example, the field value for Dependency Status is changed to I

Note: *When a query statement is highlighted, the software removes the operator and the change button is grayed out. To activate the change button, the oeprator must be added back*

To change fields or values

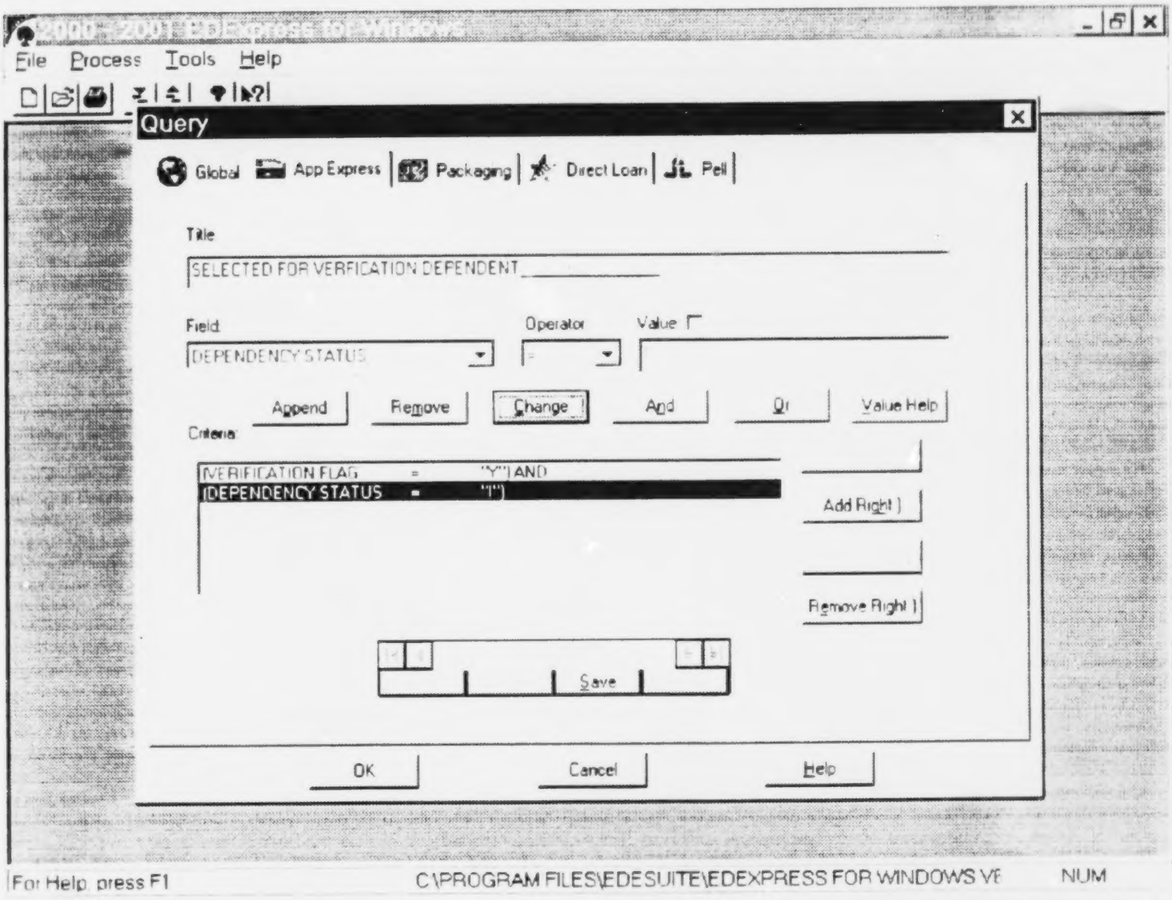
Click the line you want to change

*To display the **Change** button, click the **Operator** down arrow*

Select the correct Operator (=)

*Change the **Value** (I)*

*Click the **Change** button*


2000 - 2001 EDExpress for Windows
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Append
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Change
And
Or
Value Help
Add Right)
Remove Right)
Save
OK
Cancel
Help
NUM

Title: SELECTED FOR VERFICATION DEPENDENT

Field: DEPENDENCY STATUS

Operator: =

Value

Criteria:

(VERIFICATION FLAG = "Y") AND
(DEPENDENCY STATUS = "I")

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS VE

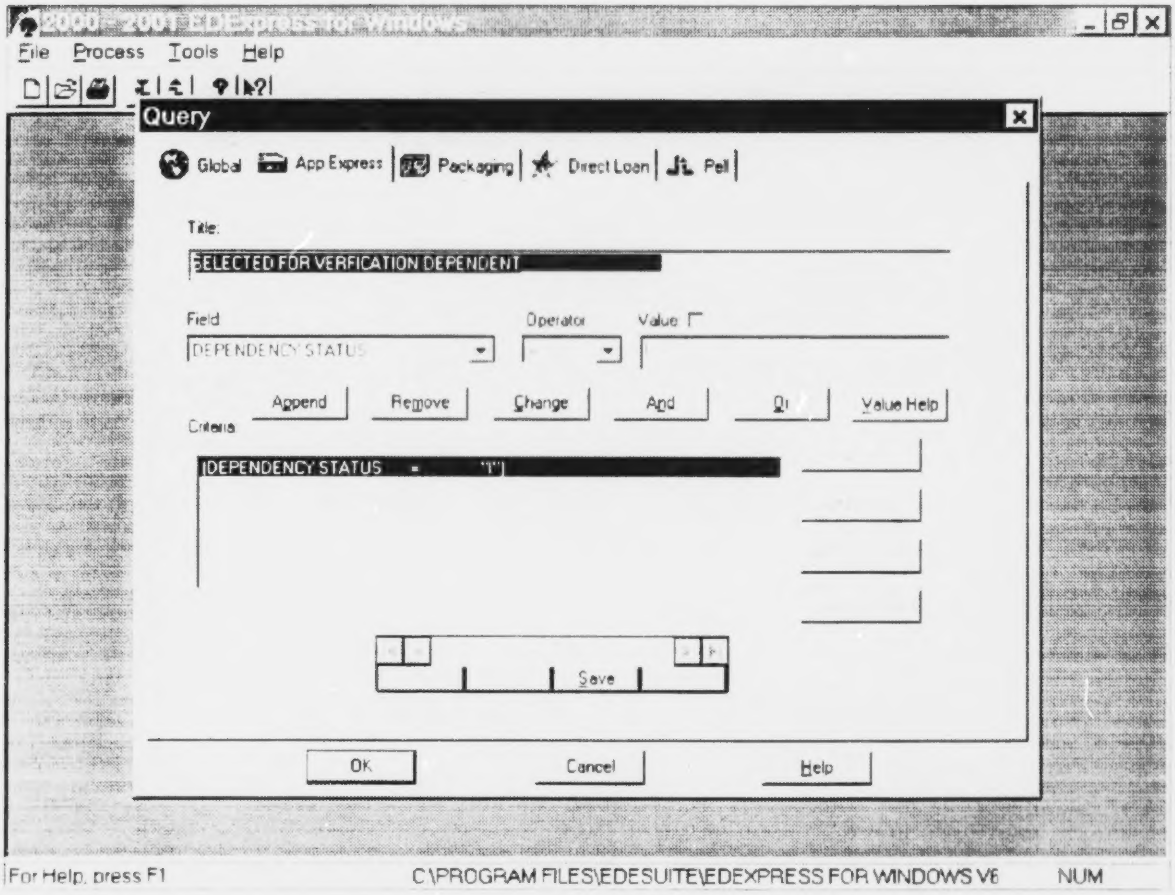
To remove lines from a query statement

Highlight the line

Click the ***Remove*** *button*

You also can remove lines from a query statement at any time

In this example, Verification Flag = Y is removed



2000–2001 EDExpress for Windows
File Process Tools Help
Query
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App Express
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Direct Loan
Pell
Append
Remove
Change
And
Or
Value Help
Save
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

Title: SELECTED FOR VERIFICATION DEPENDENT

Field: DEPENDENCY STATUS

Operator

Value ☐

Criteria:

(DEPENDENCY STATUS = 'I')

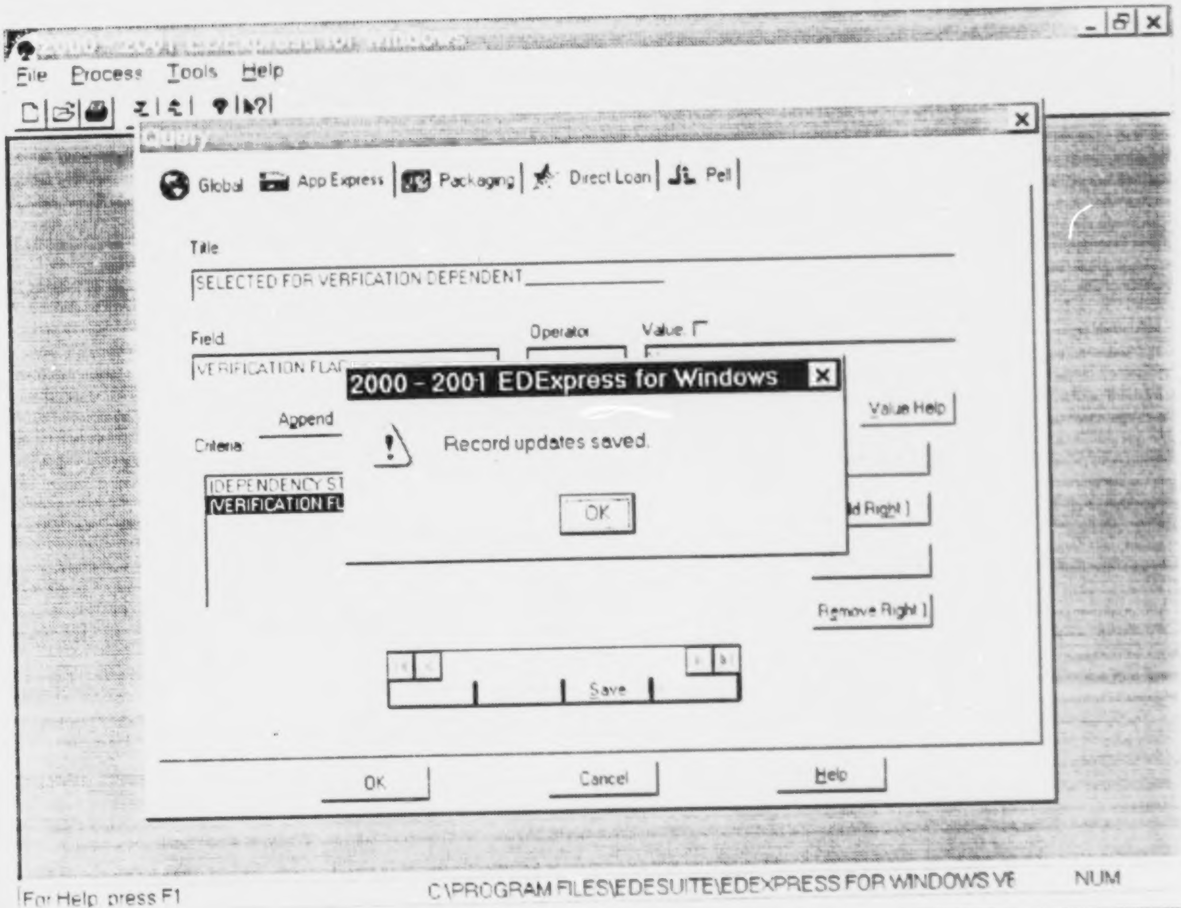
Before saving the new query, it must be restored to its original values. Change the Dependency Status **Value** to D and add or append the statement Verification Flag = Y

To save the query

Click ***Save***

A Record Updates Saved dialog box displays

Click ***OK***



Title: SELECTED FOR VERIFICATION DEPENDENT

Field: VERIFICATION FLA

Criteria:
DEPENDENCY ST
VERIFICATION FL

2000 - 2001 EDExpress for Windows

Record updates saved.

For Help, press F1
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File
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Direct Loan
Pell
Operator
Value
Append
Value Help
Add Right
Remove Right
Save
OK
OK
Cancel
Help

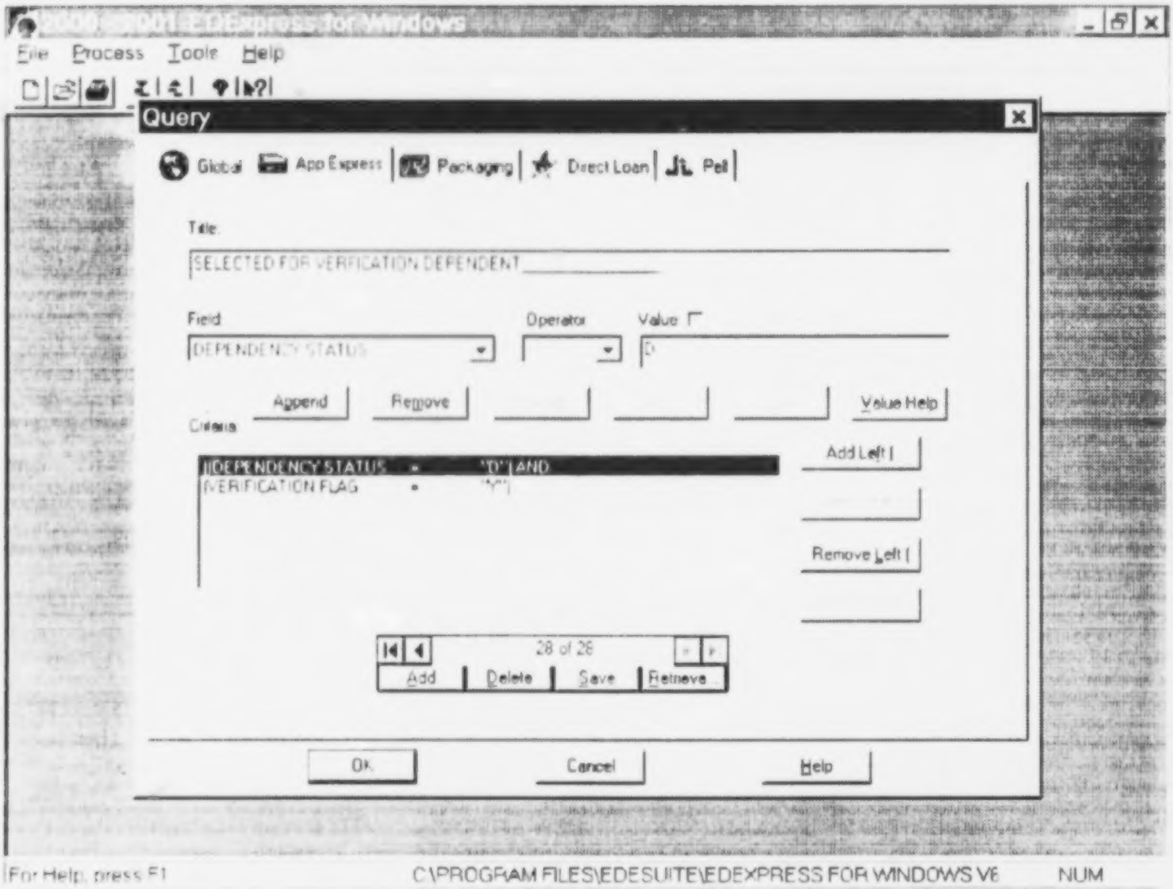
To nest the first statement

Highlight the first line and click ***Add Left (***

The (Add) buttons create nested statements and the (Remove) buttons remove parentheses

Change the query to select dependent students selected for verification OR independent students not selected for verification

Remember: *You may create complex queries by including "nested" or parenthetical statements created with the Add Right) and the Add Left (buttons*


2000-2001 EDExpress for Windows
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Global
App Express
Packaging
Direct Loan
Pell
Title:
Field
Operator
Value
Append
Remove
Value Help
Criteria
Add Left (
Remove Left (
Add
Delete
Save
Retrieve
OK
Cancel
Help

Title: SELECTED FOR VERIFICATION DEPENDENT

Field: DEPENDENCY STATUS

Value: D

```
((DEPENDENCY STATUS    =    "D") AND
(VERIFICATION FLAG     =    "Y")
```

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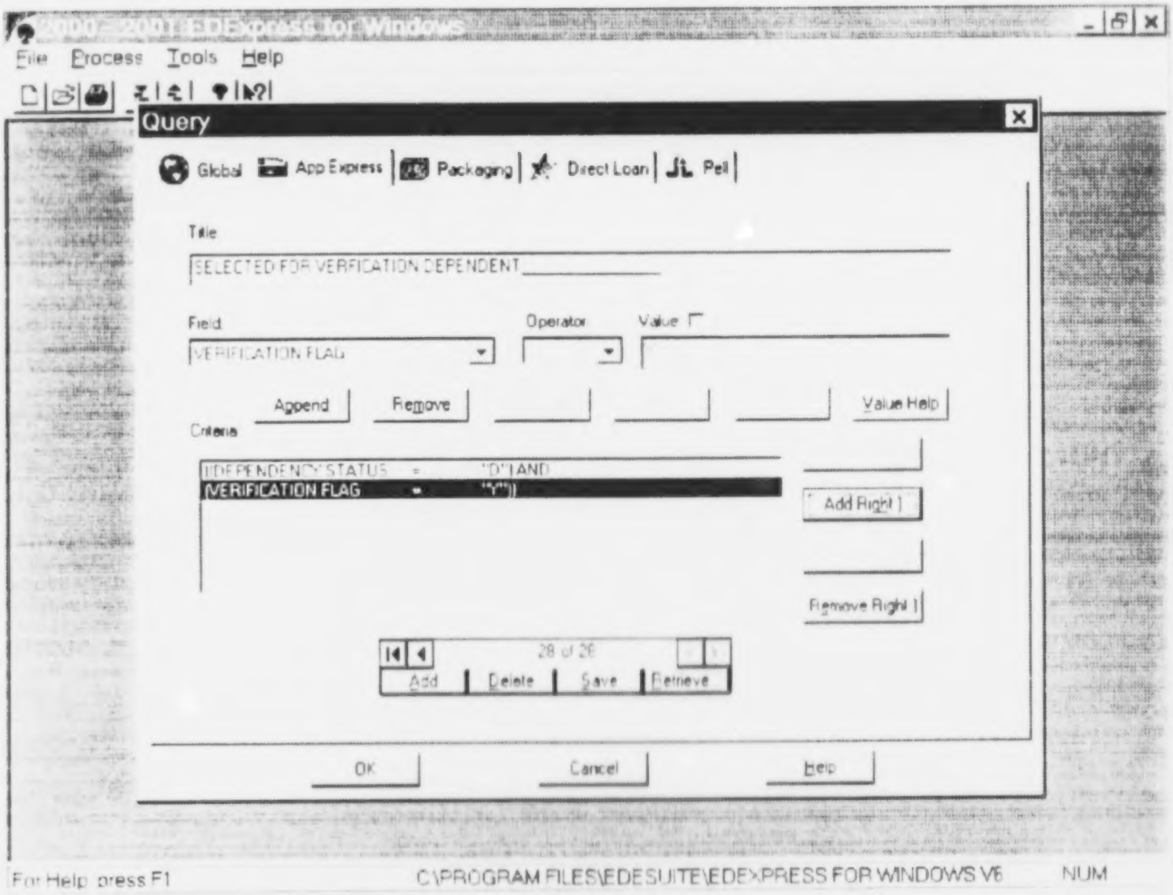
For Help, press F1   C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6   NUM

*Highlight the second line and click **Add Right)***



2000–2001 EDExpress for Windows
File Process Tools Help
Query
Global App Express Packaging Direct Loan Pell
Append
Remove
Value Help
Add Right)
Remove Right)
28 of 28
Add Delete Save Retrieve
OK Cancel Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

Title: SELECTED FOR VERIFICATION DEPENDENT

Field: VERIFICATION FLAG

Operator:

Value: ☐

Criteria:

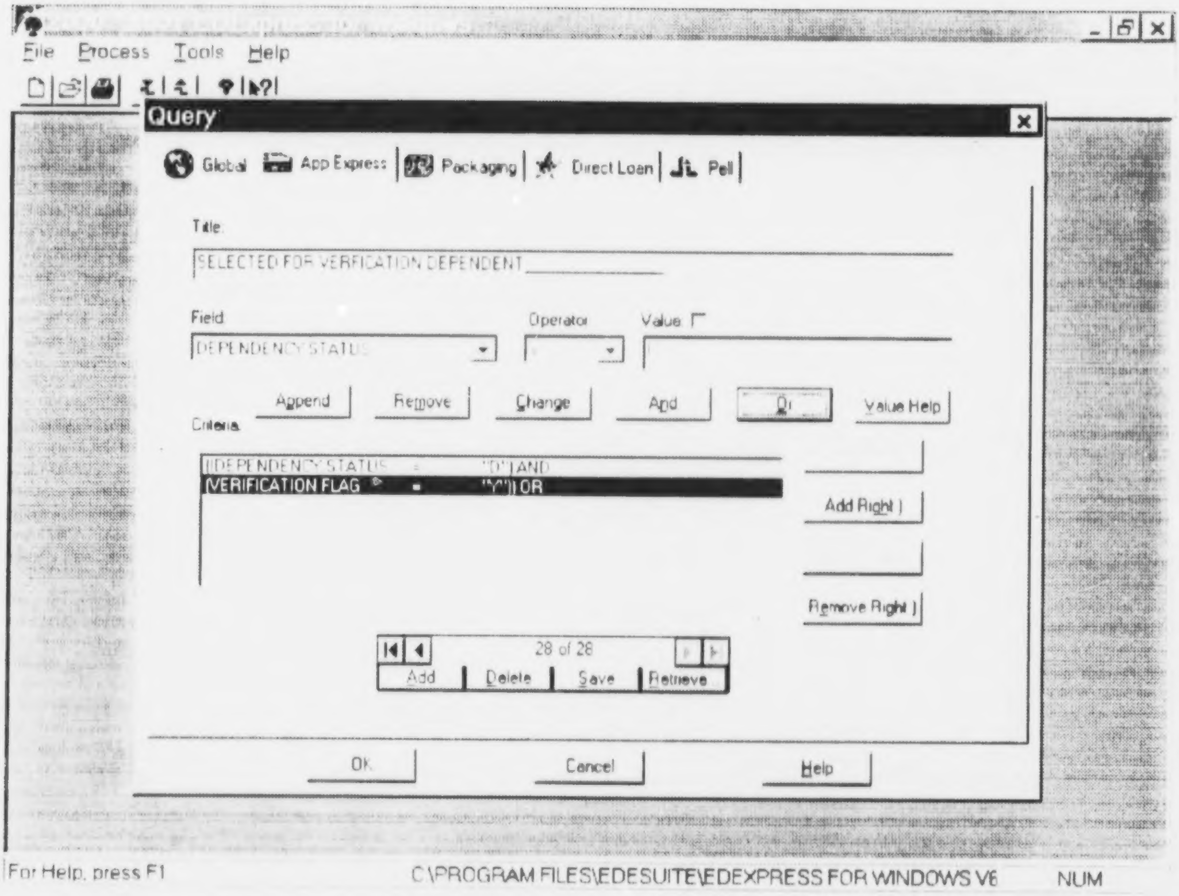
```
((DEPENDENCY STATUS    =    "D") AND
(VERIFICATION FLAG     =    "Y"))
```

To add the second nested statement

Click the ***Field*** *and select Dependency Status = I*

The ***Connectors*** *AND and OR are accessible*

Click ***OR***


File
Process
Tools
Help
Query
Global
App Express
Packaging
Direct Loan
Pell
Append
Remove
Change
And
Or
Value Help
Add Right)
Remove Right)
Add
Delete
Save
Retrieve
OK
Cancel
Help

Title: SELECTED FOR VERIFICATION DEPENDENT

Field: DEPENDENCY STATUS

Operator:

Value: ☐

Criteria:

```
((DEPENDENCY STATUS    =    "D") AND
(VERIFICATION FLAG     =    "Y")) OR
```

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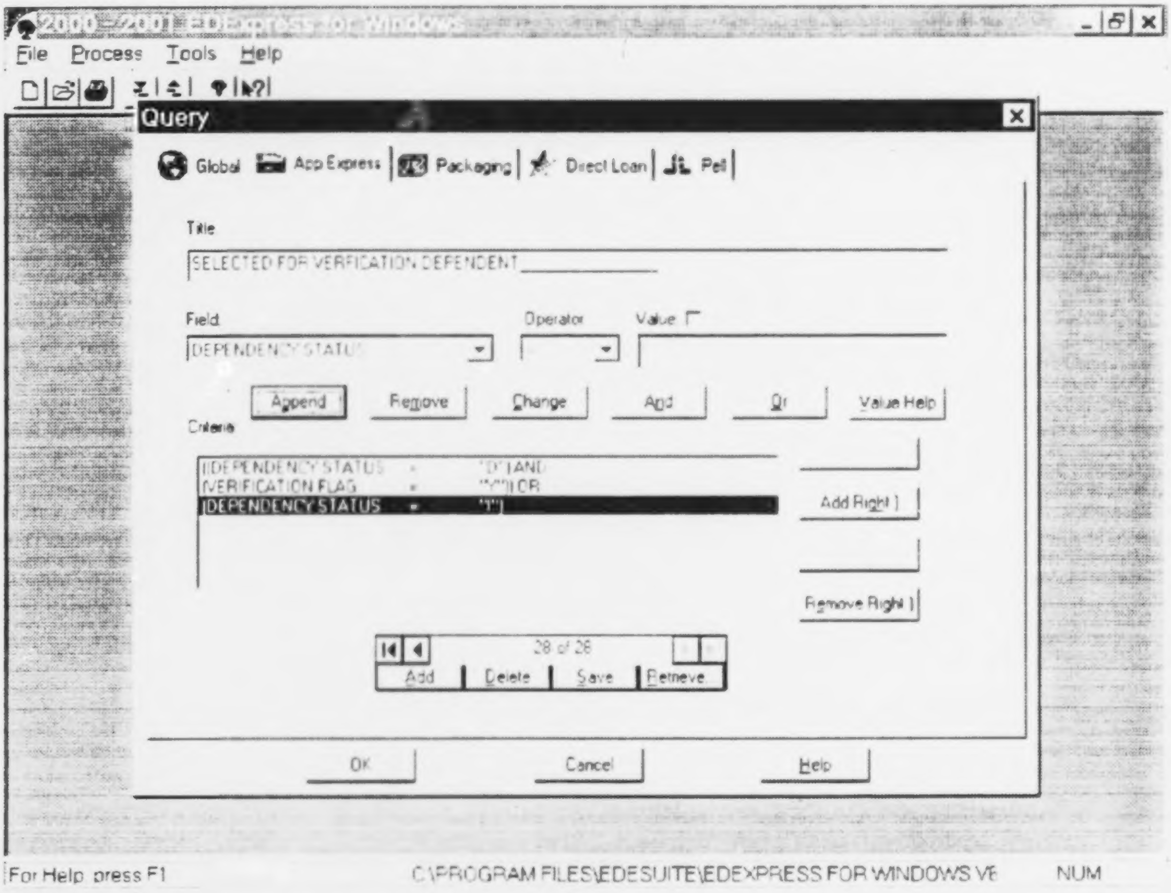
For Help, press F1   C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6   NUM

Click ***Append*** *then* ***AND***


2000–2001 EDExpress for Windows
File
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App Express
Packaging
Direct Loan
Pell
Title
Field
Operator
Value
Append
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Change
And
Or
Value Help
Criteria
Add Right)
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Add
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Retrieve
OK
Cancel
Help
For Help, press F1
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Title: SELECTED FOR VERIFICATION DEPENDENT

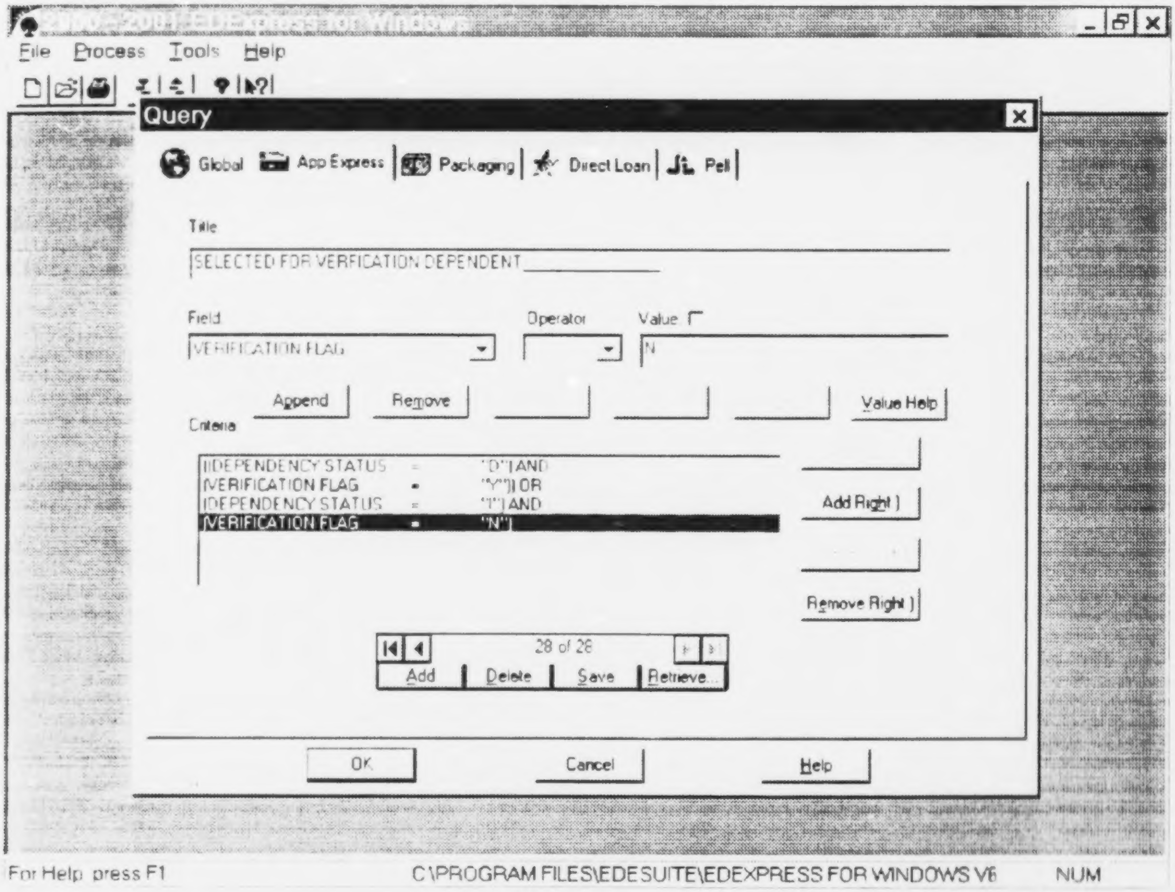
Field: DEPENDENCY STATUS

```
((DEPENDENCY STATUS    =     "D") AND
(VERIFICATION FLAG     =     "Y")) OR
(DEPENDENCY STATUS     =     "I")
```

BEST COPY AVAILABLE

Enter the rest of the statement: Verification Flag = N

Then click ***Append***


2000-2001 EDExpress for Windows
File
Process
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Help
Query
Global
App Express
Packaging
Direct Loan
Pell
Append
Remove
Value Help
Add Right)
Remove Right)
28 of 28
Add
Delete
Save
Retrieve...
OK
Cancel
Help

Title: SELECTED FOR VERFICATION DEPENDENT

Field: VERIFICATION FLAG

Operator:

Value: N

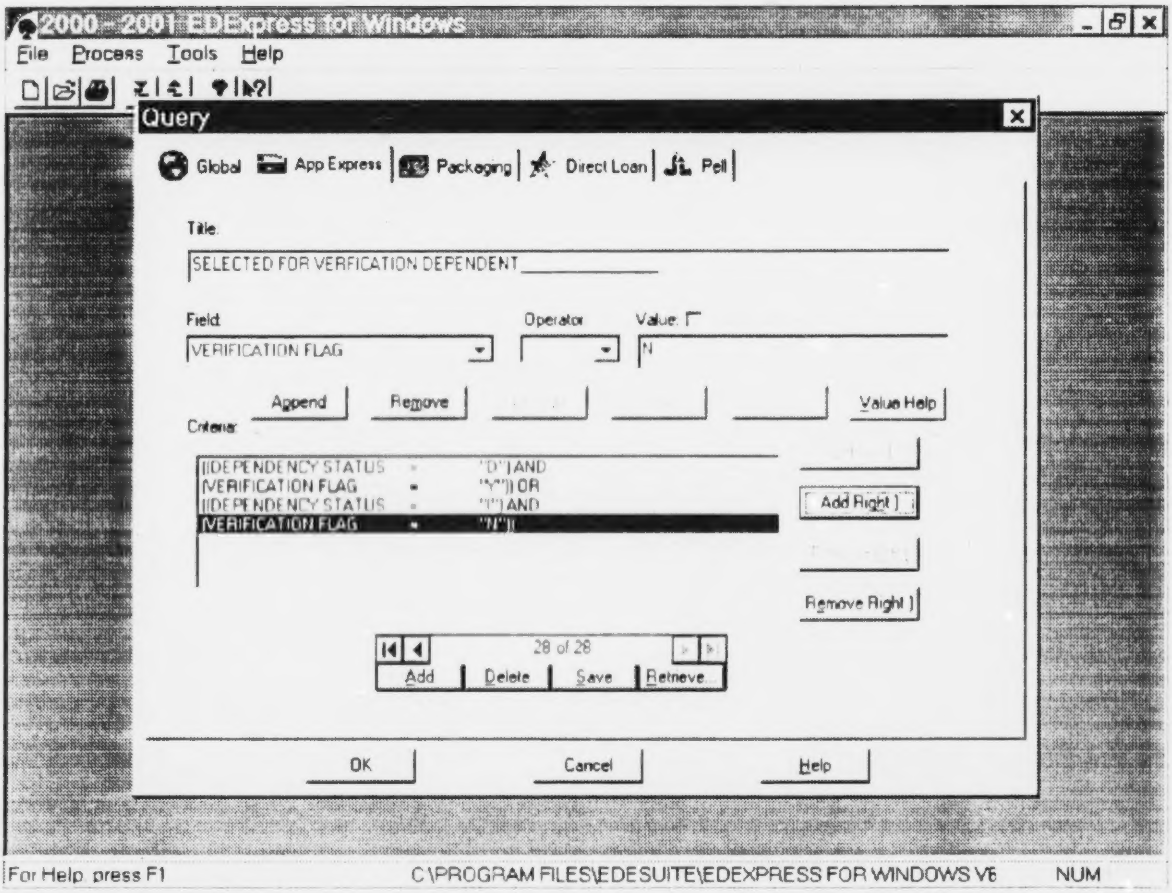
Criteria:

```
((DEPENDENCY STATUS    =       "D") AND
(VERIFICATION FLAG     =       "Y")) OR
(DEPENDENCY STATUS     =       "I") AND
(VERIFICATION FLAG     =       "N")
```

For Help, press F1   C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6   NUM

To nest the second statement

Click ***Add Left (****, then* ***Add Right)***


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Query
Global
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Append
Remove
Value Help
Add Right)
Remove Right)
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Add
Delete
Save
Retrieve...
OK
Cancel
Help
NUM

Title: SELECTED FOR VERFICATION DEPENDENT

Field: VERIFICATION FLAG

Operator:

Value: ☐ N

Criteria:

```
((DEPENDENCY STATUS    =    "D") AND
(VERIFICATION FLAG     =    "Y")) OR
((DEPENDENCY STATUS    =    "I") AND
(VERIFICATION FLAG     =    "N"))
```

For Help, press F1   C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6

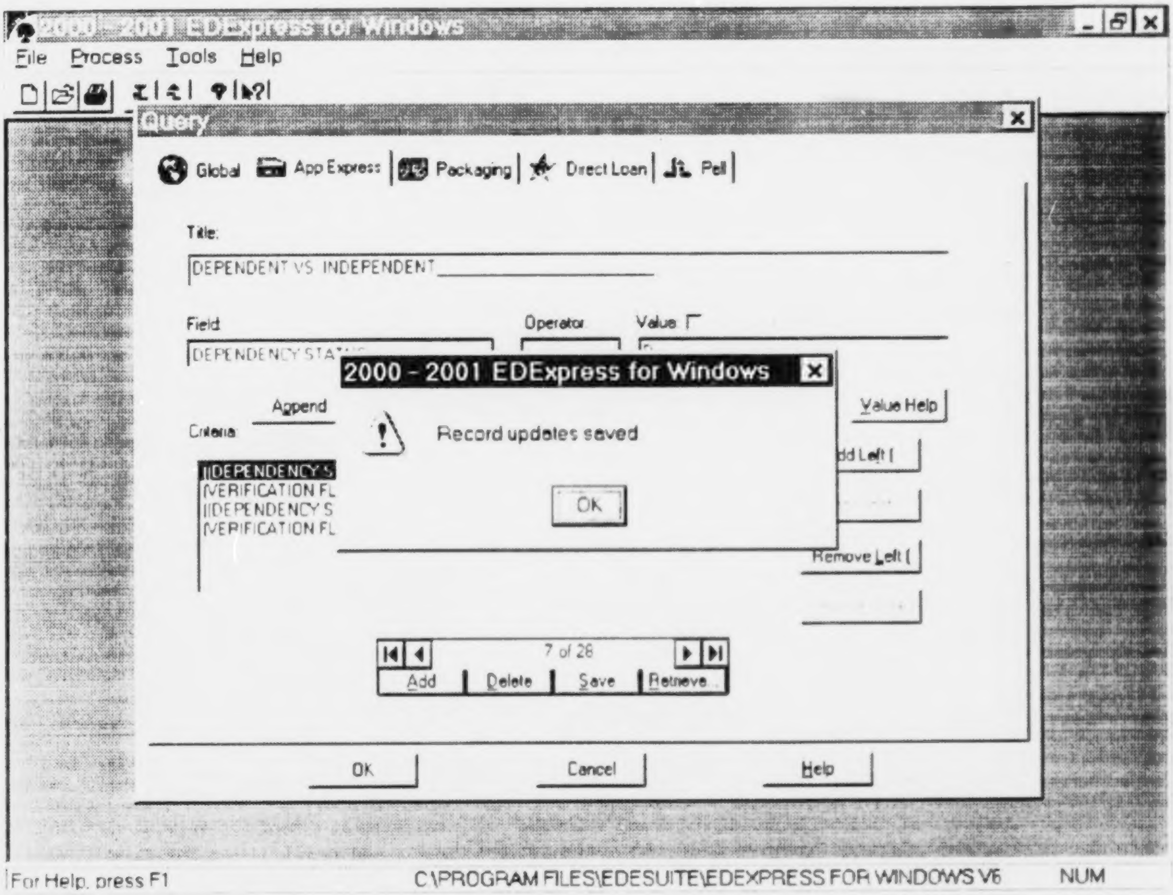
To create a new query by modifying an existing query

Modify the Field(s) and/or Value(s)

Change the query Title

Save the changes

You can use an existing query as a template for creating a new query. Simply modify the existing query, change its title, and save the changes.



Title: DEPENDENT VS INDEPENDENT

Field: DEPENDENCY STAT

Criteria:
|(DEPENDENCY S
(VERIFICATION FL
|(DEPENDENCY S
(VERIFICATION FL

2000 - 2001 EDExpress for Windows

Record updates saved

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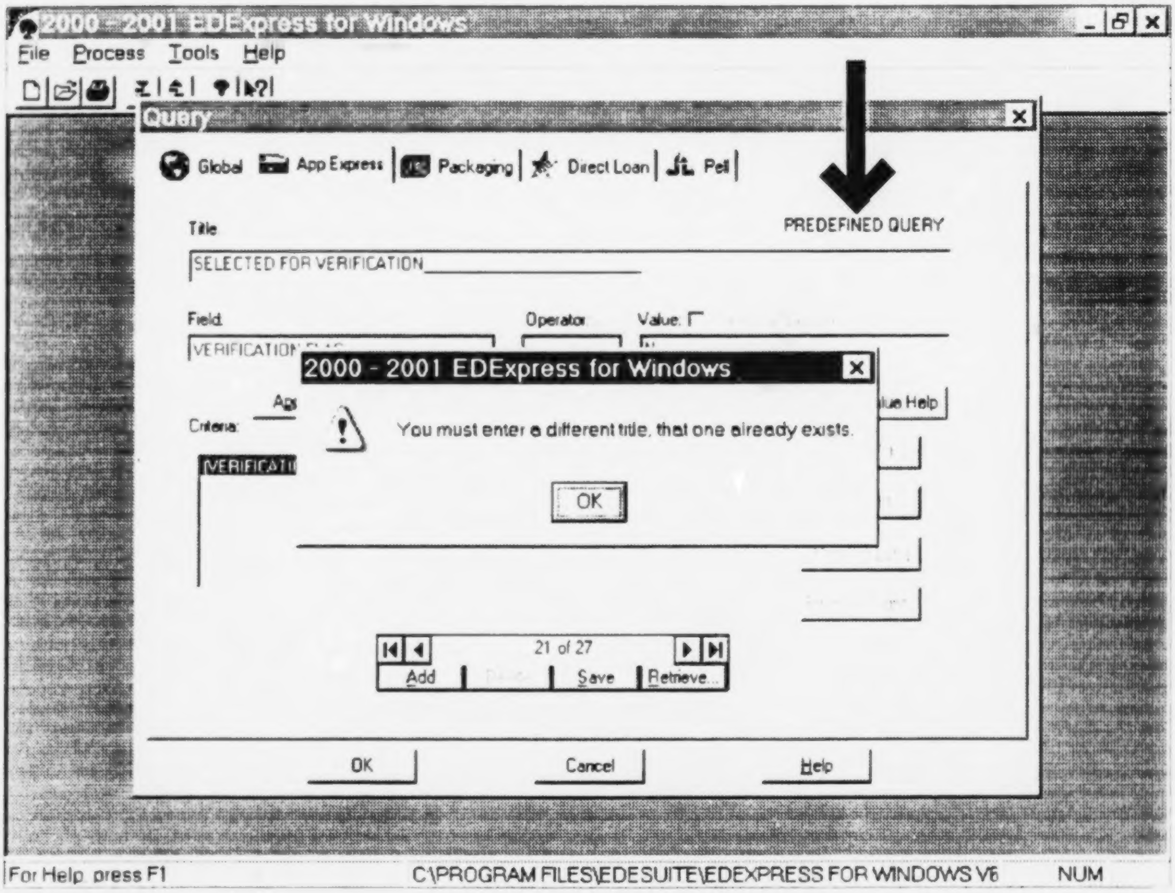
For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6 NUM

2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Query
Global
App Express
Packaging
Direct Loan
Pell
Operator
Value
Append
Value Help
Add Left (
Remove Left (
OK
Add
Delete
Save
Retrieve...
OK
Cancel
Help

Only existing user-defined queries can be modified without changing the titles

Tip: Predefined queries are identified both in the upper right-hand corner of the Query dialog box and in the Retrieve dialog box that lists available queries

When you try to save changes to an EDExpress predefined query, the system prompts you to enter a different title


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Query
Global
App Express
Packaging
Direct Loan
Pell
PREDEFINED QUERY
Title
Field
Operator
Value:
Criteria:
Value Help
2000 - 2001 EDExpress for Windows
OK
21 of 27
Add
Save
Retrieve...
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

Title: SELECTED FOR VERIFICATION

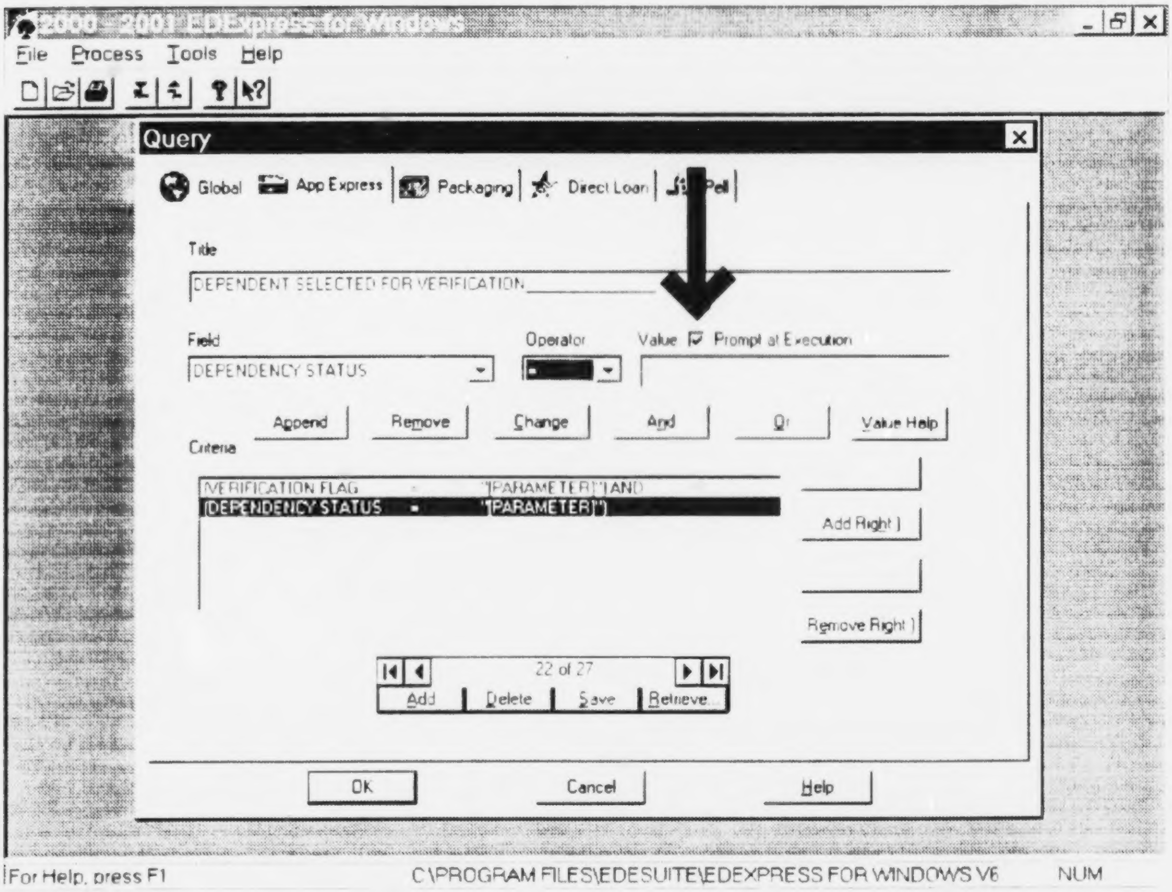
You must enter a different title, that one already exists.

To create a parameter query

Follow the steps for creating a new query

But, enable the Prompt at Execution checkbox for each selection statement of the query for which you want this option

A parameter query instructs the system to prompt for a field value at the time you run the query. You create and modify parameter queries just as you would other queries—except that you enable the Prompt at Execution checkbox in place of entering values for the fields for which you want to be prompted.


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Query
Global
App Express
Packaging
Direct Loan
Pell
Append
Remove
Change
And
Or
Value Help
Add Right)
Remove Right)
Add
Delete
Save
Retrieve...
OK
Cancel
Help

Title: DEPENDENT SELECTED FOR VERIFICATION

Field: DEPENDENCY STATUS

Operator: =

Value ☑ Prompt at Execution

Criteria:

```
(VERIFICATION FLAG    =    "[PARAMETER]") AND
(DEPENDENCY STATUS    =    "[PARAMETER]")
```

22 of 27

For Help, press F1   C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6   NUM

Before using a query you created or modified to perform EDExpress functions, you should test the query to verify that it's working correctly. To test a query, use the Selection Criteria option to print a system-defined report from within the module that the query was created.

[Slide 1-41]

Tip: To test queries created in the Global, App Express, and Packaging modules, you can generate and print the following reports

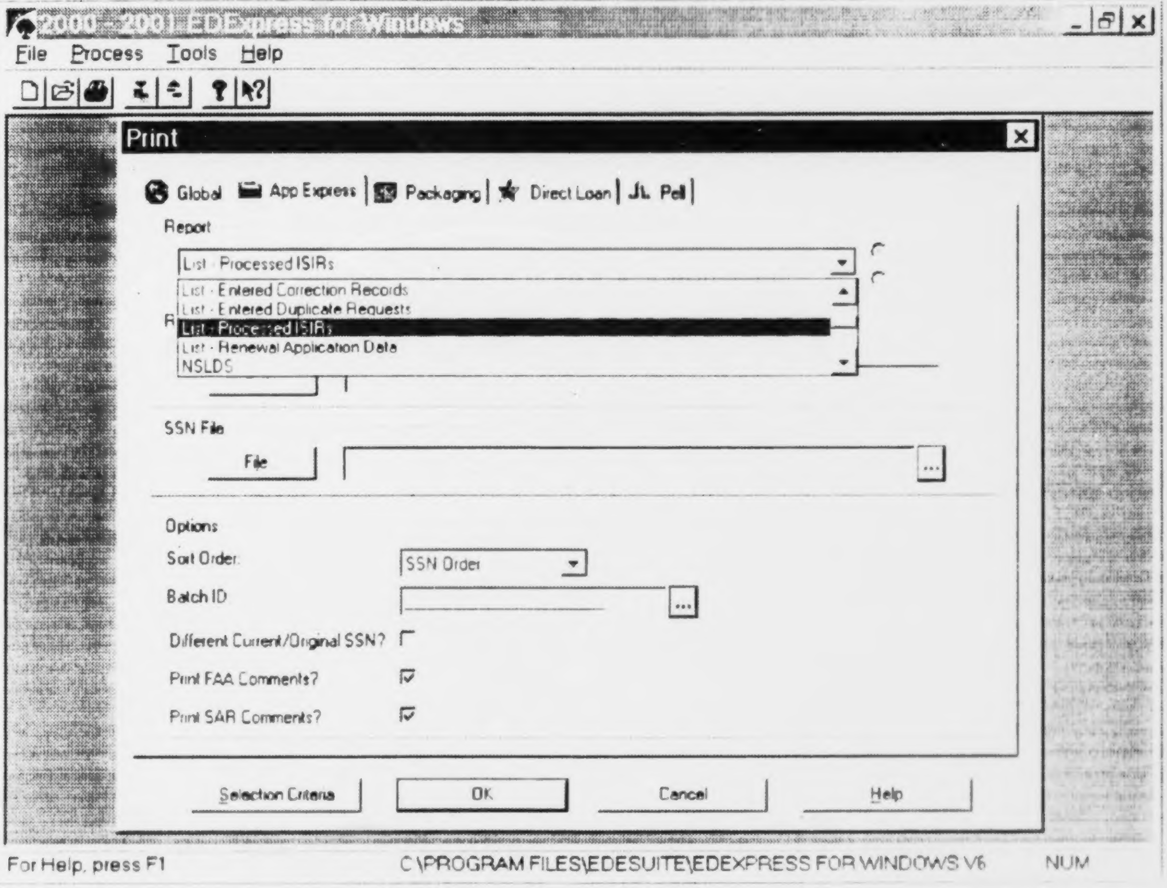
Global Module	*List-Document Tracking by Student*
App Express Module	*List-Processed ISIRs*
Packaging Module	*List-Entered Packaging Records*

To print a report that selects ISIR records based on a query created within the App Express module

*Select **File/Print** from the main menu*

*Click the **App Express** tab*

*Select the List-Processed ISIRs report from the list that displays when you click the **Report** down arrow*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Print
Global
App Express
Packaging
Direct Loan
Pell
Report
List - Entered Correction Records
List - Entered Duplicate Requests
List - Processed ISIRs
List - Renewal Application Data
NSLDS
SSN File
File
Options
Selection Criteria
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

Report: List - Processed ISIRs

Sort Order: SSN Order

Batch ID:

Different Current/Original SSN? ☐

Print FAA Comments? ☑

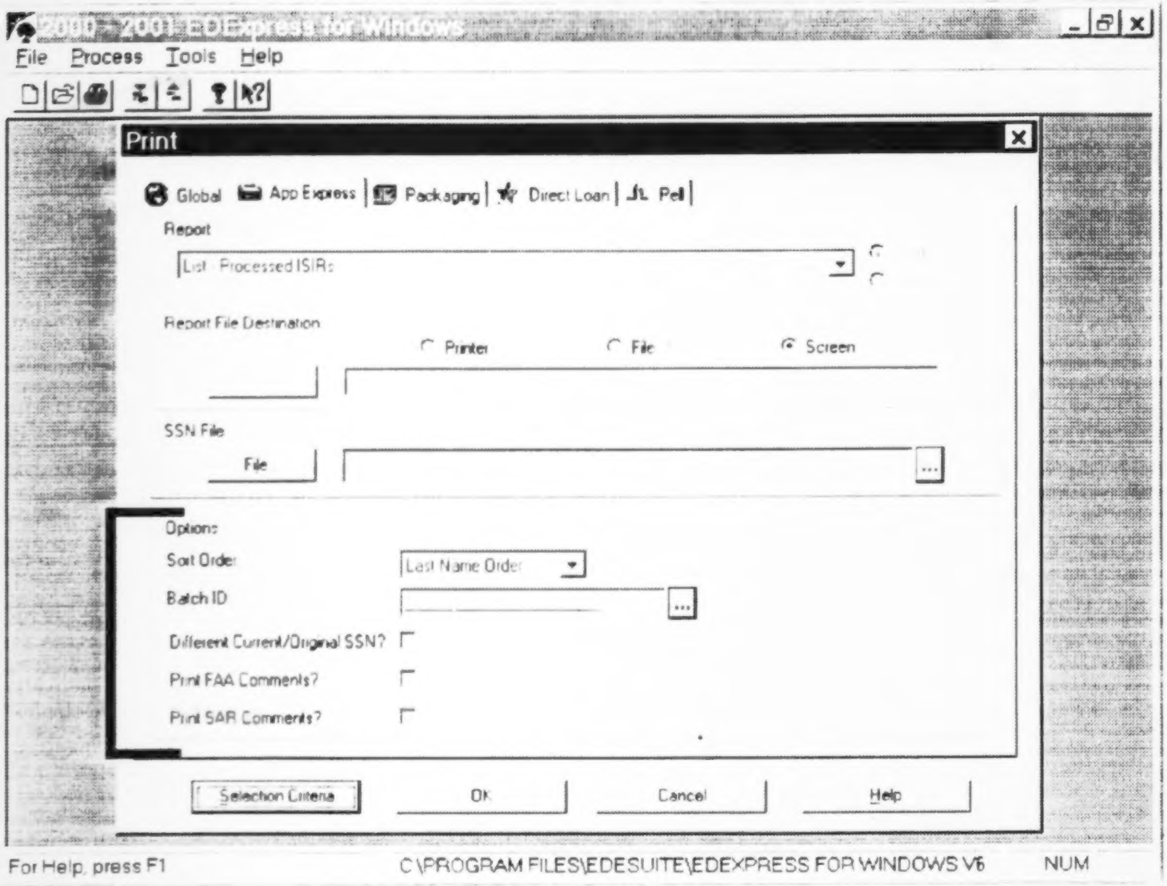
Print SAR Comments? ☑

Select Screen as the ***Report File Destination***

Select the ***Options*** *you want*

Click the ***Selection Criteria*** *button*

Let's print the report to screen


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Print
Global
App Express
Packaging
Direct Loan
Pell
File
Selection Criteria
OK
Cancel
Help
For Help, press F1
NUM

Report: List - Processed ISIRs

Report File Destination: ○ Printer ○ File ● Screen

SSN File

Options

Sort Order: Last Name Order

Batch ID:

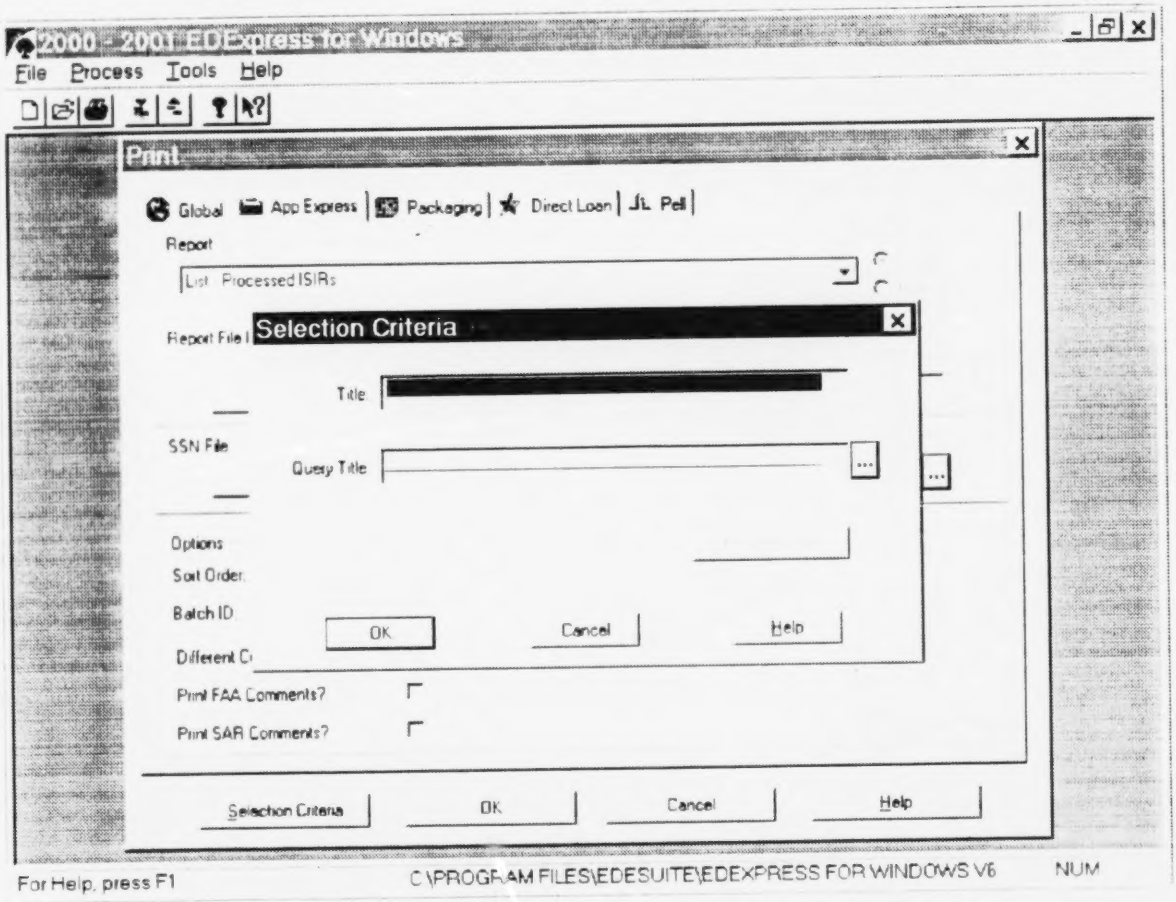
Different Current/Original SSN? ☐

Print FAA Comments? ☐

Print SAR Comments? ☐

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6

A Selection Criteria dialog box displays


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Print
Global
App Express
Packaging
Direct Loan
Pell
Report
Report File
SSN File
Options
Sort Order
Batch ID
Different C
Print FAA Comments? ☐
Print SAR Comments? ☐
Selection Criteria
OK
Cancel
Help
Selection Criteria
Title
Query Title
...
OK
Cancel
Help
For Help, press F1
NUM

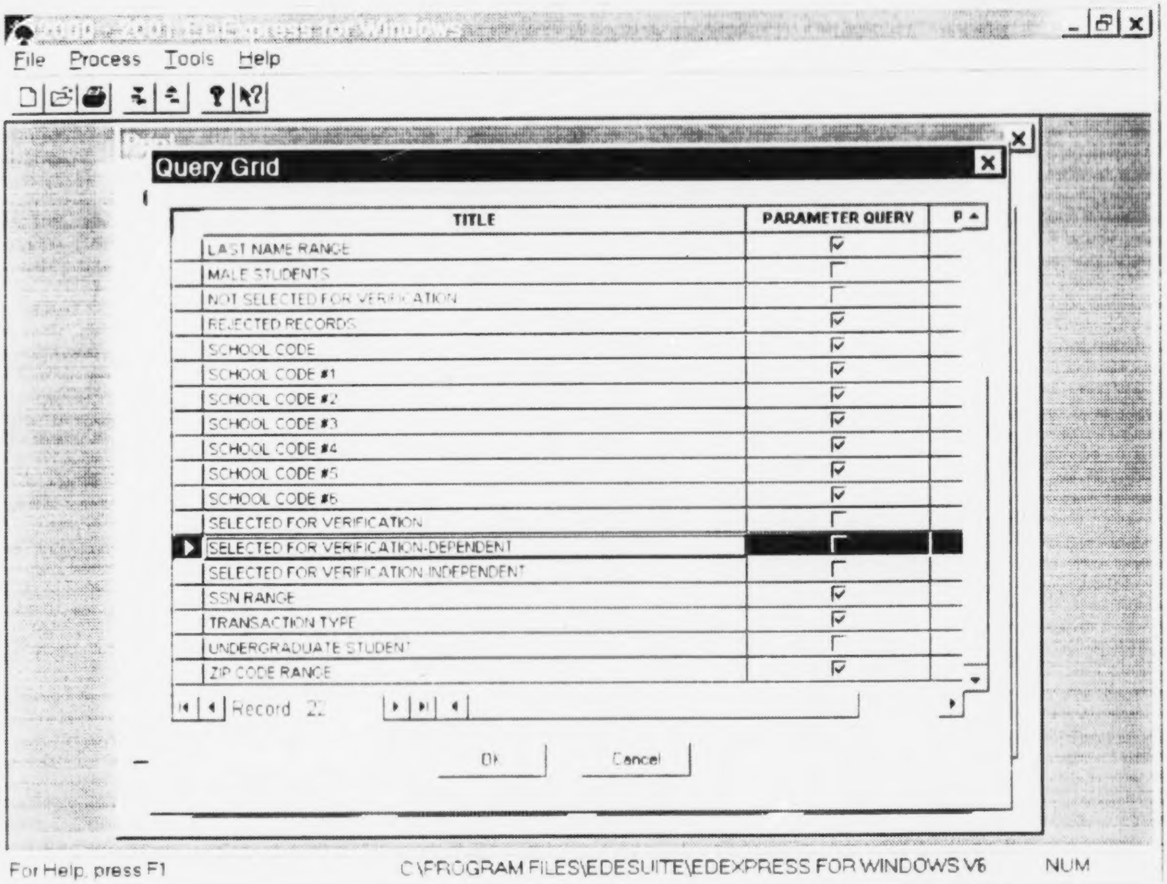
Report: List Processed ISIRs

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6

Click the ***Query Title*** *ellipsis button to display the list of available queries*

Click or highlight the Query you want

Click ***OK***



TITLE	PARAMETER QUERY	P
LAST NAME RANGE	☑	
MALE STUDENTS	☐	
NOT SELECTED FOR VERIFICATION	☐	
REJECTED RECORDS	☑	
SCHOOL CODE	☑	
SCHOOL CODE #1	☑	
SCHOOL CODE #2	☑	
SCHOOL CODE #3	☑	
SCHOOL CODE #4	☑	
SCHOOL CODE #5	☑	
SCHOOL CODE #6	☑	
SELECTED FOR VERIFICATION	☐	
SELECTED FOR VERIFICATION-DEPENDENT	☐	
SELECTED FOR VERIFICATION-INDEPENDENT	☐	
SSN RANGE	☑	
TRANSACTION TYPE	☑	
UNDERGRADUATE STUDENT	☐	
ZIP CODE RANGE	☑	

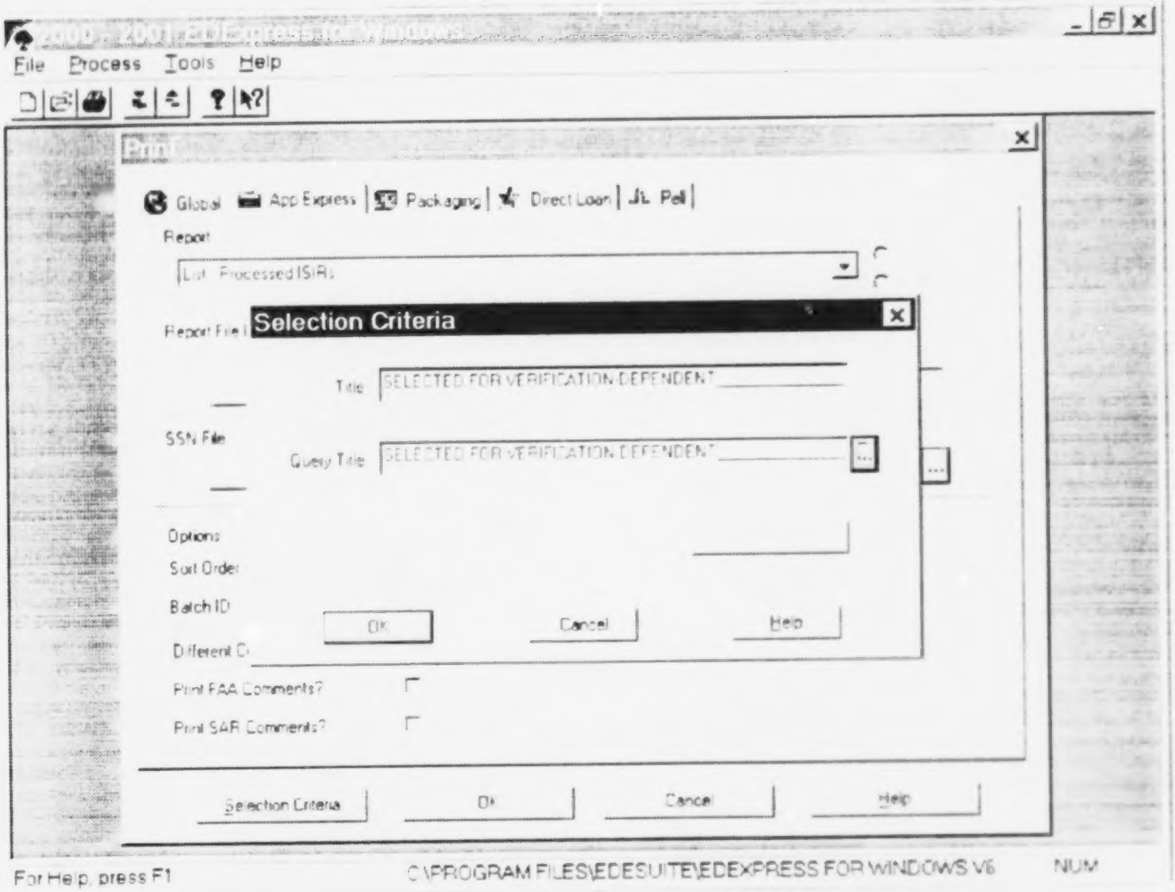
Record 22

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6 NUM

The Selection Criteria dialog box displays the query title

*Click **OK** to close the dialog box*

*Click **OK** to generate the report*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Print
Global
App Express
Packaging
Direct Loan
Pell
Report File
SSN File
Options
Sort Order
Batch ID
Different C
Selection Criteria
OK
Cancel
Help
Selection Criteria
OK
Cancel
Help

Report: List Processed ISIRs

Title: SELECTED FOR VERIFICATION DEPENDENT

Query Title: SELECTED FOR VERIFICATION DEPENDENT

Print FAA Comments? ☐

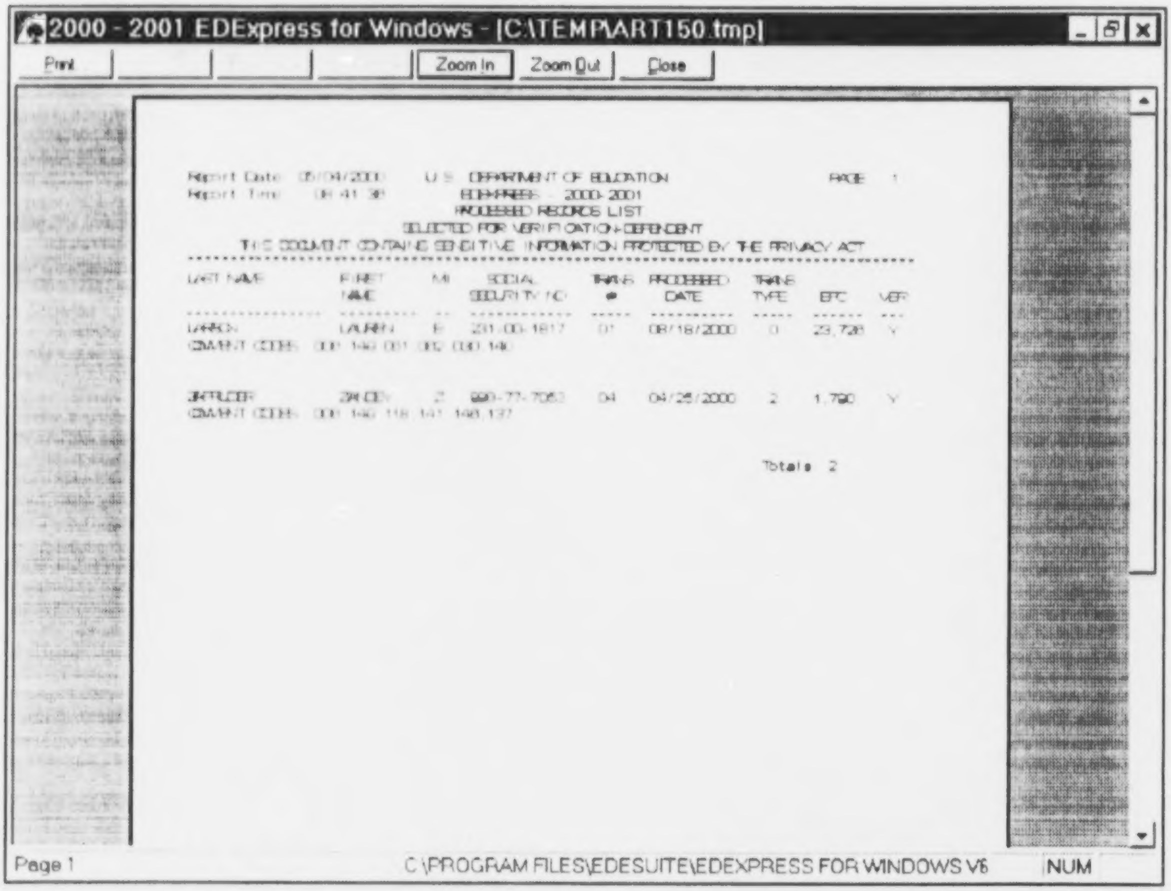
Print SAR Comments? ☐

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6 NUM

The In Progress dialog box displays as the query selects the records and the report generates.

When the system is done searching for records, the report prints or displays the records selected.

Based on the ISIR records in the App Express database and the selection criteria specified in the query *Selected for Verification-Dependent*, the report displays students who are selected for verification and who are dependent.


2000 - 2001 EDExpress for Windows - [C:\TEMP\ART150.tmp]
Print
Zoom In
Zoom Out
Close
Page 1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

```
Report Date  05/04/2000      U.S. DEPARTMENT OF EDUCATION                PAGE  1
Report Time  08:41:38             EDEXPRESS - 2000-2001
                                 PROCESSED RECORDS LIST
                            SELECTED FOR VERIFICATION-DEPENDENT
     THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
*******************************************************************************
LAST NAME          FIRST     MI   SOCIAL        TRANS  PROCESSED   TRANS
                   NAME           SECURITY NO     #      DATE      TYPE    EFC    VER

                                                        Totals  2
```

Apply What You Learned

Complete the following exercise to see how much you remember about using EDExpress Online Help and working with queries.

EDExpress Online Help

Read the following statements and determine if each is true or false. On the blank lines next to the statements, mark *T* if a statement is true and *F* if a statement is false.

_____ 1. The *What's New for 2000-2001* feature of EDExpress Online Help details new federal financial aid regulations.

_____ 2. The number of Online Help categories available to you depends on the version of EDExpress you're using as well as what modules you've installed.

_____ 3. You can use the *Annotate* function to customize Help text by adding your own comments. Customized Help text can be identified by the exclamation mark icon that displays just before the title of the topic.

_____ 4. Use the *F1* function to access help on an individual data field within an open student record.

_____ 5. After selecting *Using Help* from the main toolbar menu, tabs for *Contents*, *Index*, and *Find* display. *Index* displays an alphabetical list of FinAid-L topics.

Working with Queries

Refer to the table on page 1-16.

In the blank before each number, write the letter of the corresponding EDExpress module in which a query would be created to perform the task listed.

Use *G* for Global, *P* for Packaging or *A* for App Express.

_____ 1. Generate/print Document Tracking Letters

_____ 2. Assign Funds

_____ 3. Add Documents (Process batch function)

_____ 4. Import ISIR data into Packaging module

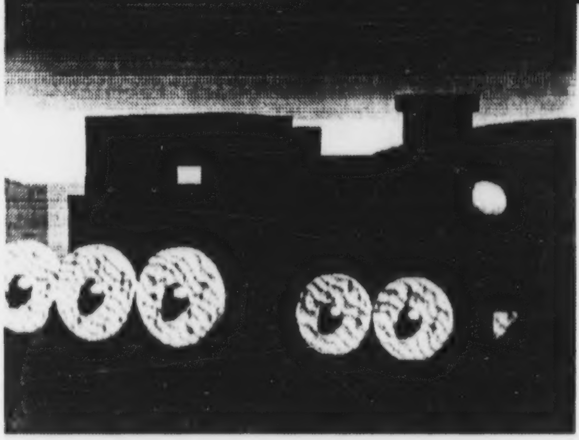
_____ 5. Generate/print Award Letters

_____ 6. Add Budgets (Process batch function)

_____ 7. Assign Documents (Multiple Entry/Global function)

_____ 8. Assign Budgets (Multiple Entry/Global function)

Unit 2



System Setups

Let's think of the various functions of the EDExpress Packaging system as a freight train, pulled by a locomotive. The train gets to its destination without mishap and on time only if the locomotive is powerful and efficient enough to do its job properly. The same can be said of the EDExpress Packaging system. You're only going to reach your destination—packaging financial aid awards for your students—according to plan if your software (locomotive) is strong and efficient. For the EDExpress Packaging system, setup is its locomotive.

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Lesson 2 User Database 2-19
Lesson 3 Documents 2-29
Lesson 4 User-Defined Text 2-51
Lesson 5 Packaging System Setup 2-71
Lesson 6 Academic Year Profile 2-82
Lesson 7 Budgets 2-105
Lesson 8 Fund Maintenance 2-128
Lesson 9 Award Methodology 2-147
Lesson 10 Satisfactory Academic Progress Values 2-178
Lesson 11 User-Defined Formulas 2-186

Objectives

1. Understand the steps to setting up the Packaging system
2. Recognize and understand the components and criteria required for the various setups

[Slide 2-2]

Setup Overview

A GREAT DEAL of Thought and Planning...

Getting the *setup* locomotive powered up for packaging requires a significant amount of thought and preparation up front Before working with the software, think about

- The types of aid programs your school awards and administers (federal, state, institutional, other, need-based, non-need based, etc.)
- Your school's awarding philosophy, methodologies, and priorities
- The makeup of your student populations (US citizenship, state residency, traditional, non-traditional, etc.)
- The composition of your academic programs and corresponding terms/award years (credit hour vs clock hour, term-based vs non-term based, standard vs non-standard, etc.)
- The cost of attendance for programs based upon student population (special fees, housing, etc.)
- What documents you require of aid applicants before packaging
- What documents, if any, you will continue to track after packaging
- How often you want to send out document tracking letters
- What type of award letters you want to send (Offer vs Notification)
- The maximum number of document tracking and award letters to be sent
- How many copies of letters you want to print
- How you will manage data (importing external files of data from other offices on campus, exporting files of data to share information with other offices on campus, etc.)
- How you intend to use the EDExpress Packaging software (standalone product vs integrated with other EDExpress modules)

The individual setups created in EDExpress transfer information about your institution and its financial aid awarding philosophy to the Packaging module. Some are entered in the software under the Packaging System, while others are entered under the Global System.

Global System	**Packaging System**
Global System Setup	Packaging System Setup
User Database	Academic Year Profile
Document Tracking	Budgets
User-Defined Text	Fund Maintenance
	Award Methodology
	Satisfactory Academic Progress
	User-Defined Formulas

Some of the setups are optional to the Packaging System, such as the User Database, Satisfactory Academic Progress, and User-Defined Formulas. Others are inter-related and must be set up in a specific order, such as Funds before Award Methodologies. Whatever the case, all setups are year-specific and are tied to a corresponding version of EDExpress.

Before working with the software, you also should use the various worksheets referenced throughout this training guide. Blank copies are provided in Appendix B.

[Slides 2-3 and 2-4]

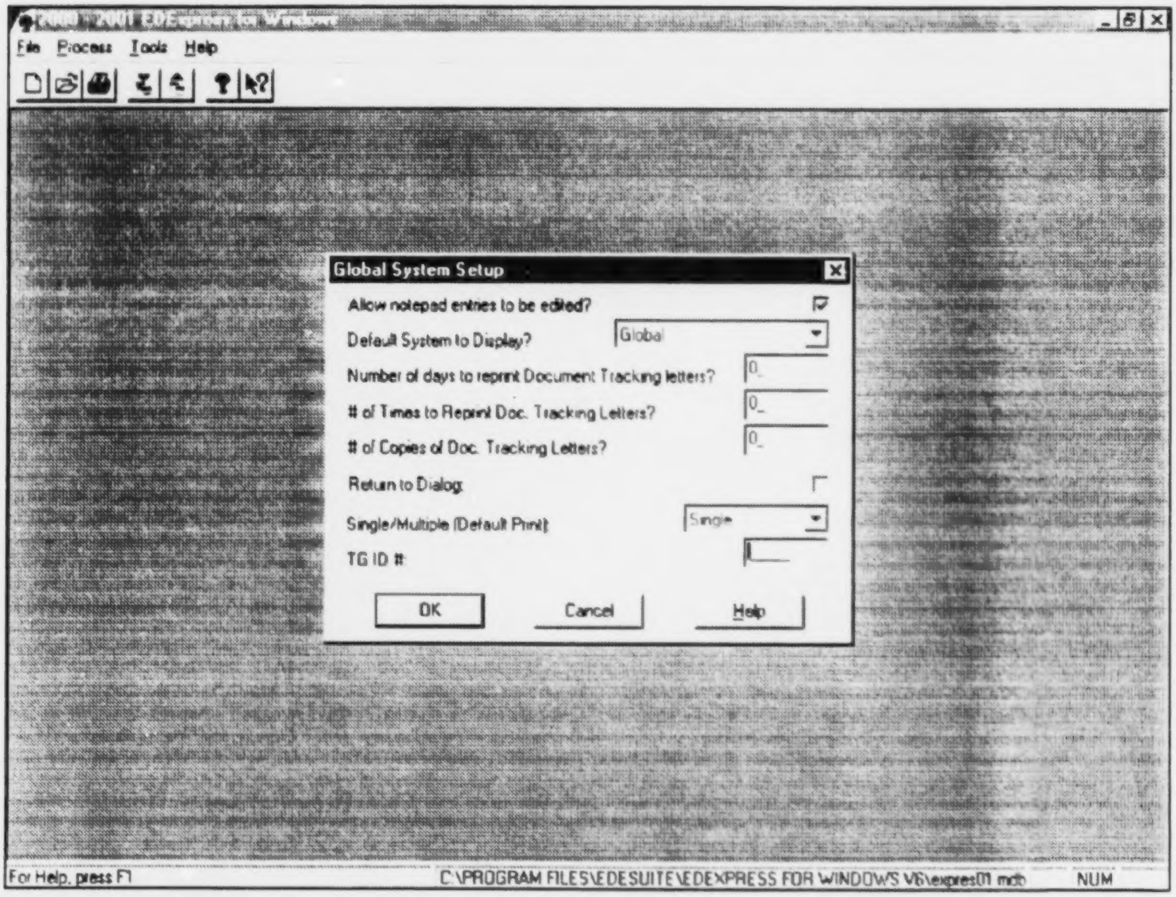
Global System Setup

Although the parameters of the Global System Setup likely have been set up already by your school's system administrator, they still can be modified. It's important to note that changes made to the Global System Setup only impact processes performed from that point on.

The Global System Setup parameters include:

- Allow Note Entries to be Edited?
- Default System to Display?
- Number of Days to reprint Tracking Letters?
- Number of times to reprint Document Tracking Letters?
- Number of Document Tracking Letters to Print?
- Return to Dialog?
- Single/Multiple (Default Print)
- TG ID #

[Slides 2-5 and 2-6]


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

Global System Setup

Allow notepad entries to be edited? ☑

Default System to Display? Global

Number of days to reprint Document Tracking letters? 0

# of Times to Reprint Doc. Tracking Letters? 0

# of Copies of Doc. Tracking Letters? 0

Return to Dialog: ☐

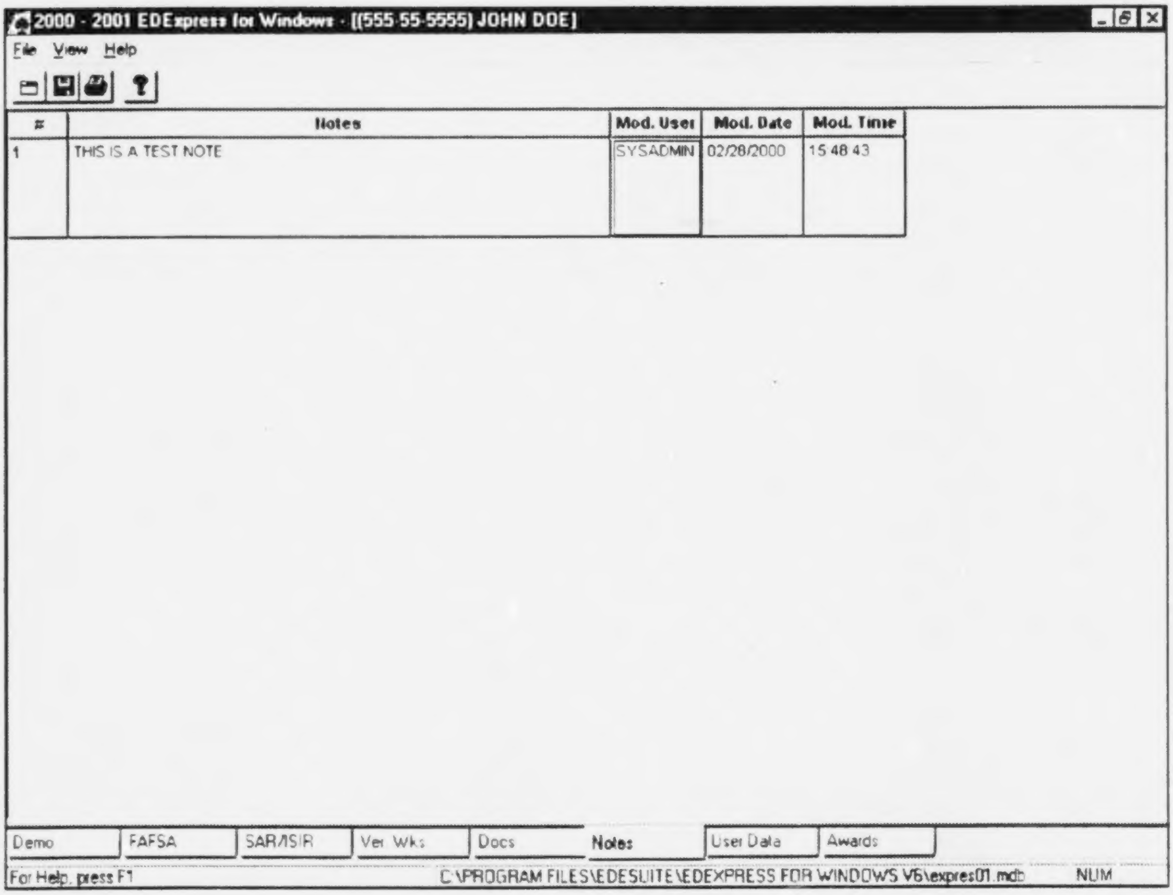
Single/Multiple (Default Print): Single

TG ID #:

Allow Note Entries to be Edited?

This option allows all EDExpress users to create and edit Notes entries on the Notes tab of a student record

For security reasons, you may want to disable this option so only the system administrator can enter Notes If this option is disabled, other users can only view Notes entries, they can't write any themselves If you do choose to allow all users to create and edit Note entries, only the user who entered a note or a user with specific security access (such as the system administrator) can delete or edit the note


2000 - 2001 EDExpress for Windows - [(555-55-5555) JOHN DOE]
File
View
Help
Demo
FAFSA
SAR/ISIR
Ver. Wks
Docs
Notes
User Data
Awards
NUM

#	Notes	Mod. User	Mod. Date	Mod. Time
1	THIS IS A TEST NOTE	SYSADMIN	02/28/2000	15 48 43

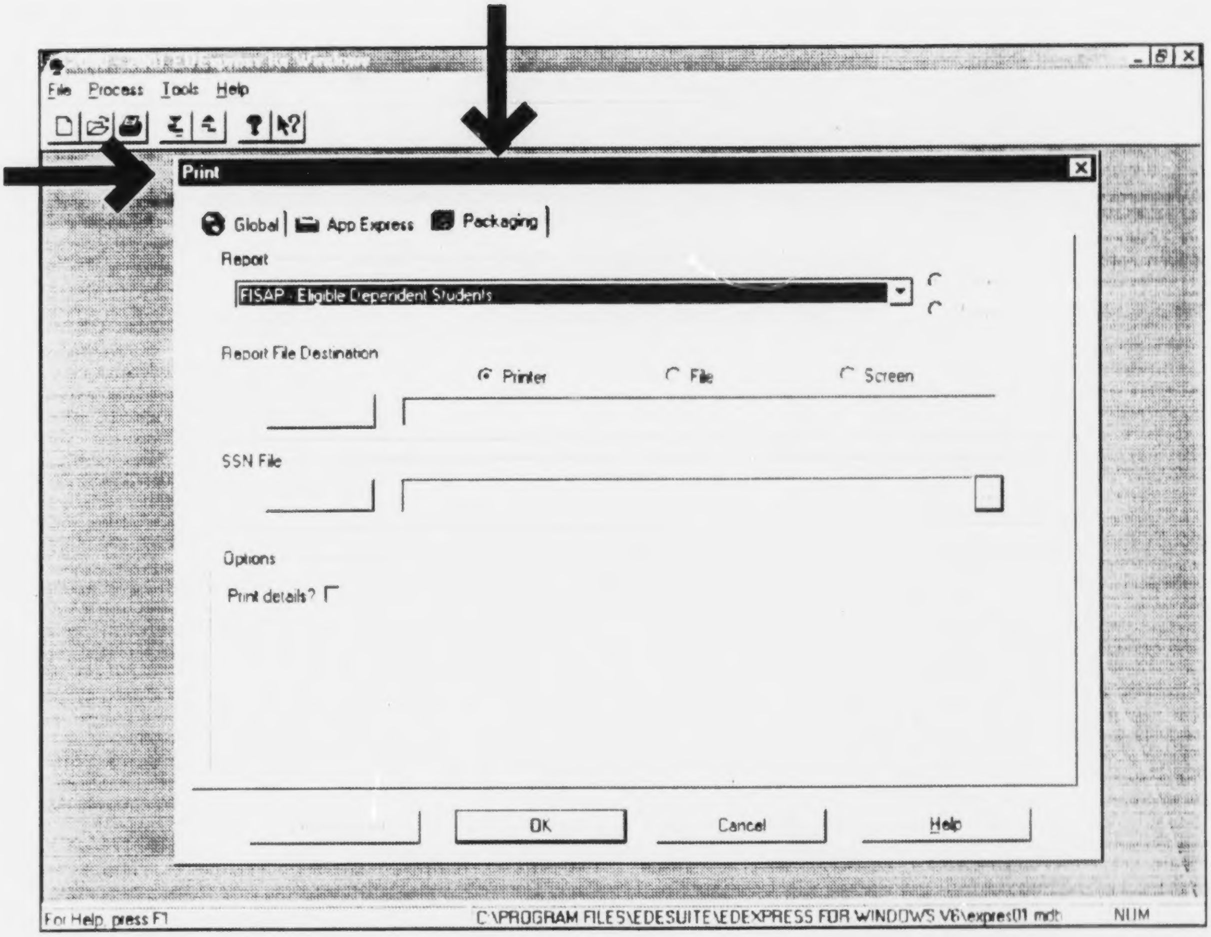
For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

Default System to Display?

This option allows you to choose which EDExpress module the system defaults to when users start up EDExpress. Import, Export, Print, Query, etc

Because the Global System Setup in this example is set to default to the Packaging module, the Packaging tab always displays automatically when EDExpress is opened or when various functions (e.g., print or query) are chosen


File
Process
Tools
Help
Print
Global
App Express
Packaging
OK
Cancel
Help

Report: FISAP - Eligible Dependent Students

Report File Destination: ● Printer ○ File ○ Screen

SSN File

Options

Print details? ☐

For Help, press F1   C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb   NUM

BEST COPY AVAILABLE

Number of Days to Reprint Tracking Letters?

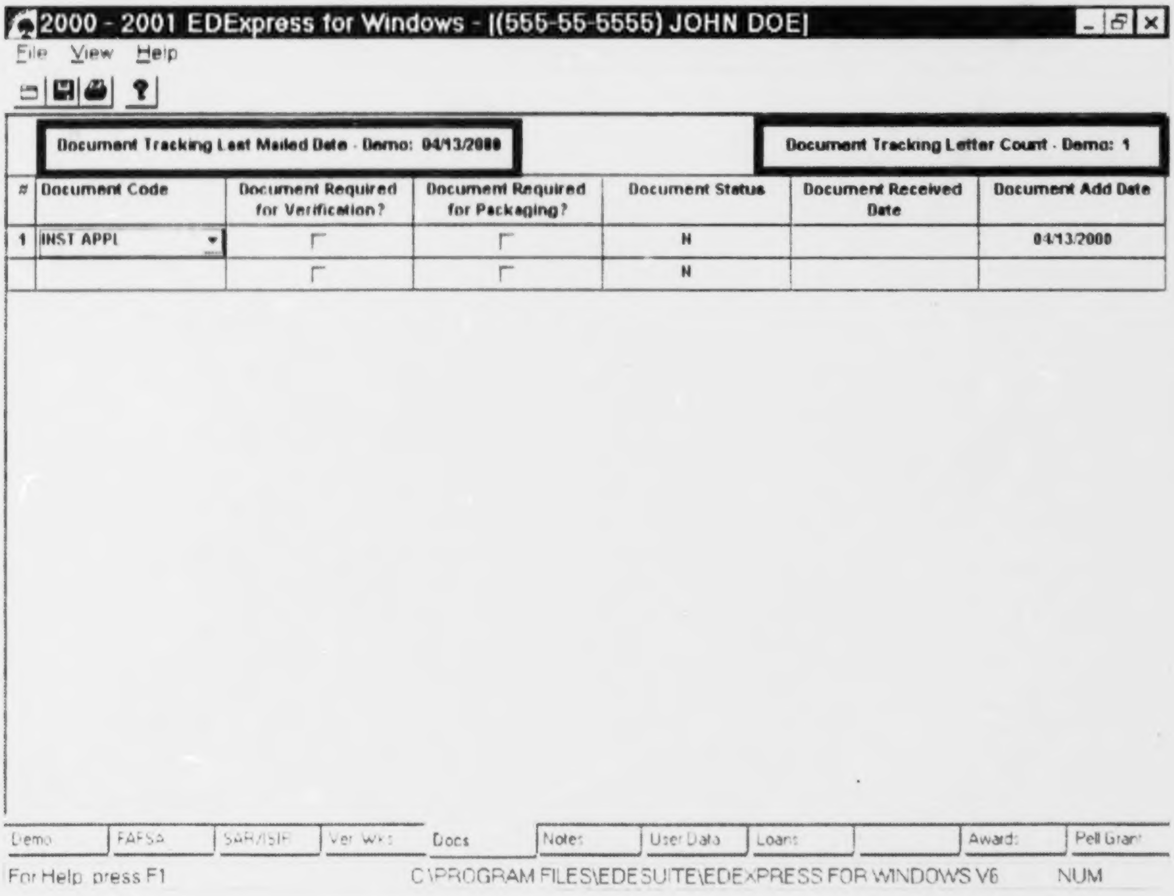
This default sets the number of days to elapse before EDExpress automatically prints another tracking letter for a student

When printing a tracking letter for a student, the date of printing is stored on the student's record on the Docs tab The next time you print tracking letters, EDExpress checks the student's record to see if the number of days specified in this field has elapsed and if tracking documents are still missing If the set number of days has elapsed and documents are still missing, EDExpress automatically prints another letter for that student Remember, this field is updated only when you print directly to a printer or to a file, not when you print to to screen

Number of Times to Reprint Document Tracking Letters?

This option sets the maximum number of document tracking letters you want to send to a student Valid values are 00-99, and the default value is 00 To set no maximum, type 00

EDExpress counts the number of times you print document tracking letters for each student The count appears on the Docs tab in each student's record This field is updated when you print to a printer or to a file To continue printing document tracking letters when the maximum number of copies set for this options has been reached, you can print individual tracking letters from the Docs tab


2000 - 2001 EDExpress for Windows - [(555-55-5555) JOHN DOE]
File View Help
Demo
FAFSA
SAR/ISIR
Ver Wks
Docs
Notes
User Data
Loans
Awards
Pell Grant
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

Document Tracking Last Mailed Date - Demo: 04/13/2000

Document Tracking Letter Count - Demo: 1

#	Document Code	Document Required for Verification?	Document Required for Packaging?	Document Status	Document Received Date	Document Add Date
1	INST APPL	☐	☐	N		04/13/2000
		☐	☐	N		

Number of Copies of Document Tracking Letters to Print?

This default designates the number of copies of document tracking letters you want EDExpress to print for each student each time you print these letters

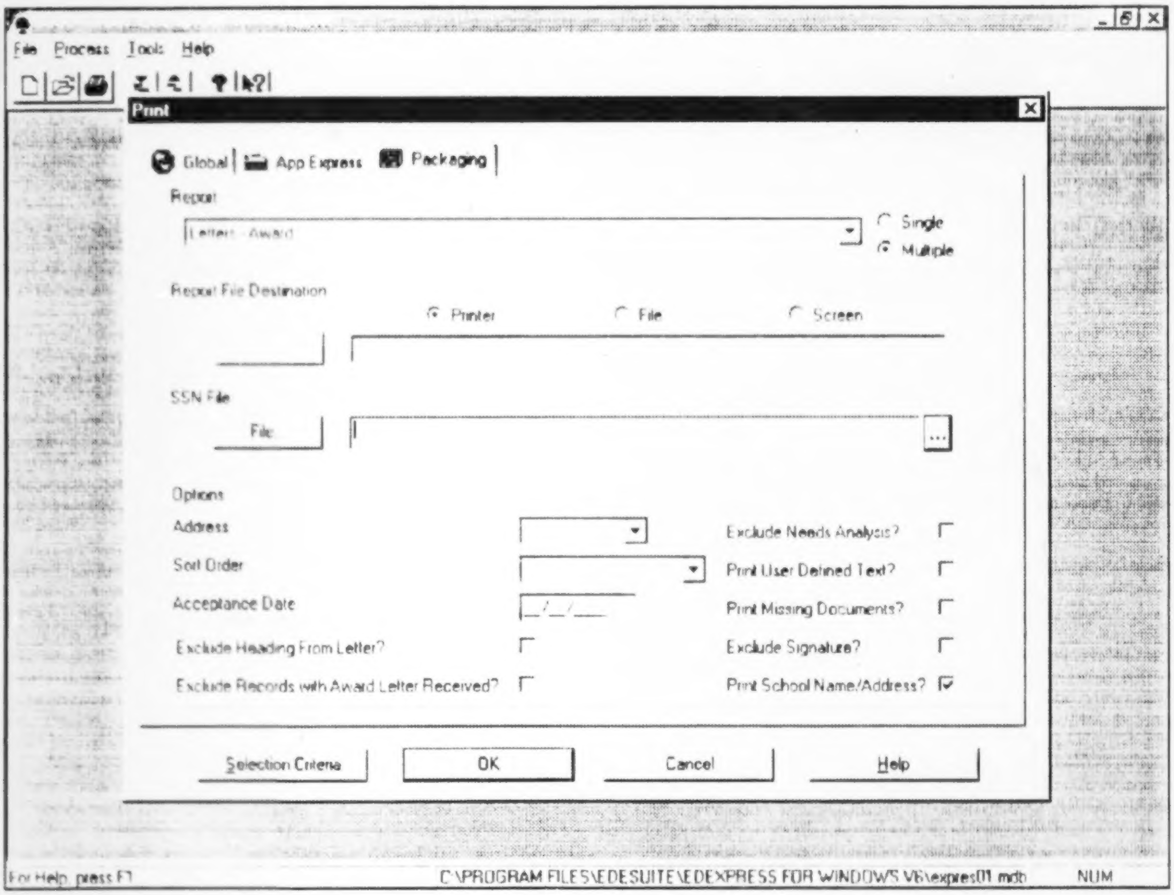
Return to Dialog?

This default option allows you to return to the appropriate dialog box when you have finished printing, exporting, importing, or using the Multiple Entry function Otherwise, EDExpress returns you to the main menu

Single/Multiple (Default Print)

This setting designates whether you want the system to default to printing a single record versus printing multiple student records Select Single if you usually print one record at a time and you want Single always selected in the Print dialog box Select Multiple if you usually print multiple records and you want Multiple always selected in the Print dialog box

You can override the system default at any time by changing this setting in the Print dialog box for a specific print job



Report: Letters - Award
○ Single
● Multiple

Report File Destination
● Printer ○ File ○ Screen

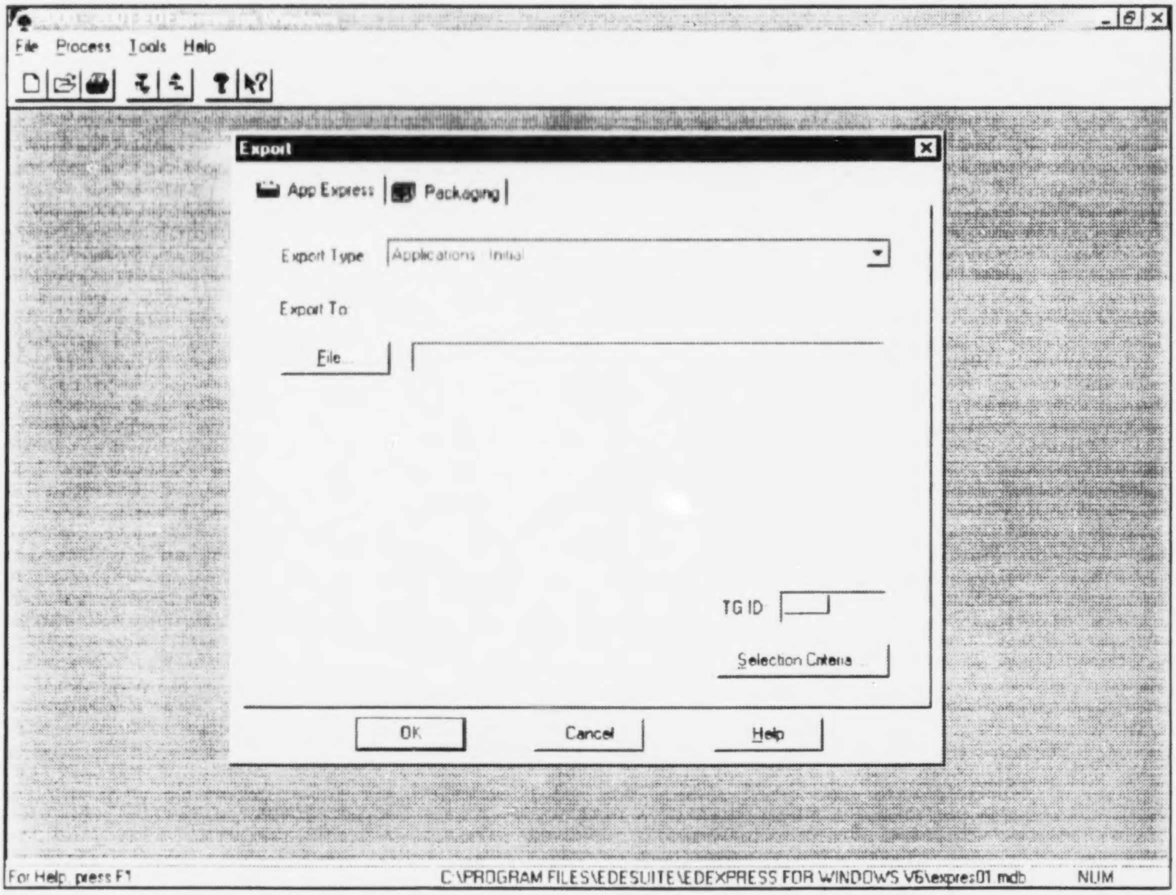
SSN File
File

Options
Address
Sort Order
Acceptance Date __/__/____
Exclude Heading From Letter? ☐
Exclude Records with Award Letter Received? ☐
Exclude Needs Analysis? ☐
Print User Defined Text? ☐
Print Missing Documents? ☐
Exclude Signature? ☐
Print School Name/Address? ☑

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb NUM

TG ID

The TG ID is the seven-character number is assigned to your school upon receipt of its Participation Agreement. The TG ID identifies your institution as a destination point and consists of the prefix TG5 or TG6 and four numbers.


File
Process
Tools
Help
Export
App Express
Packaging
Export To
File...
TG ID
Selection Criteria
OK
Cancel
Help
NUM

Export Type: Applications - Initial

For Help, press F1

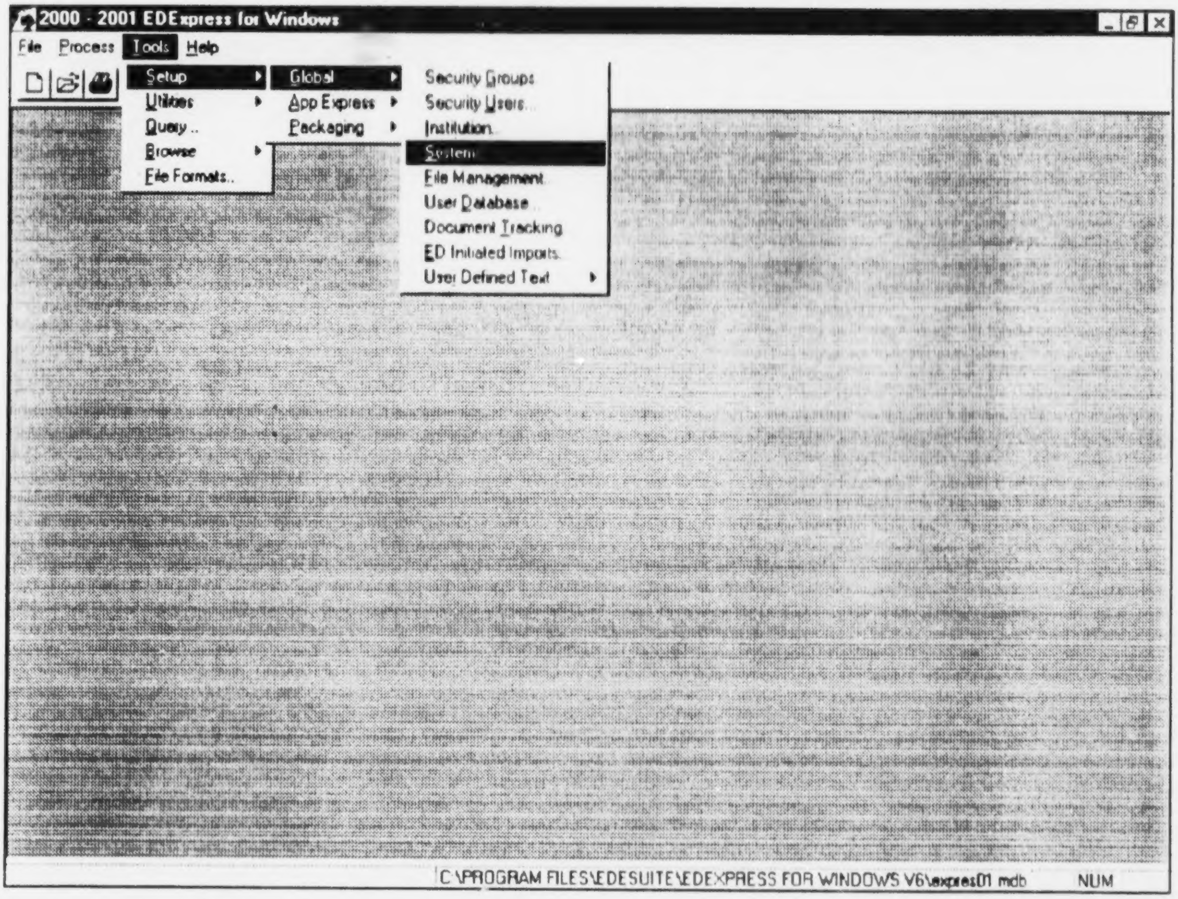
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

Setting Global System Parameters

The following example demonstrates how to set up Global System parameters. (Refer to the Sample Global System Setup worksheet on the next page.)

To set or modify your school's Global System Setup parameters.

Select ***Tools/Setup/Global/System*** *from the menu bar.*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Setup
Utilities
Query...
Browse
File Formats...
Global
App Express
Packaging
Security Groups
Security Users...
Institution...
System...
File Management
User Database...
Document Tracking
ED Initiated Imports...
User Defined Text
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

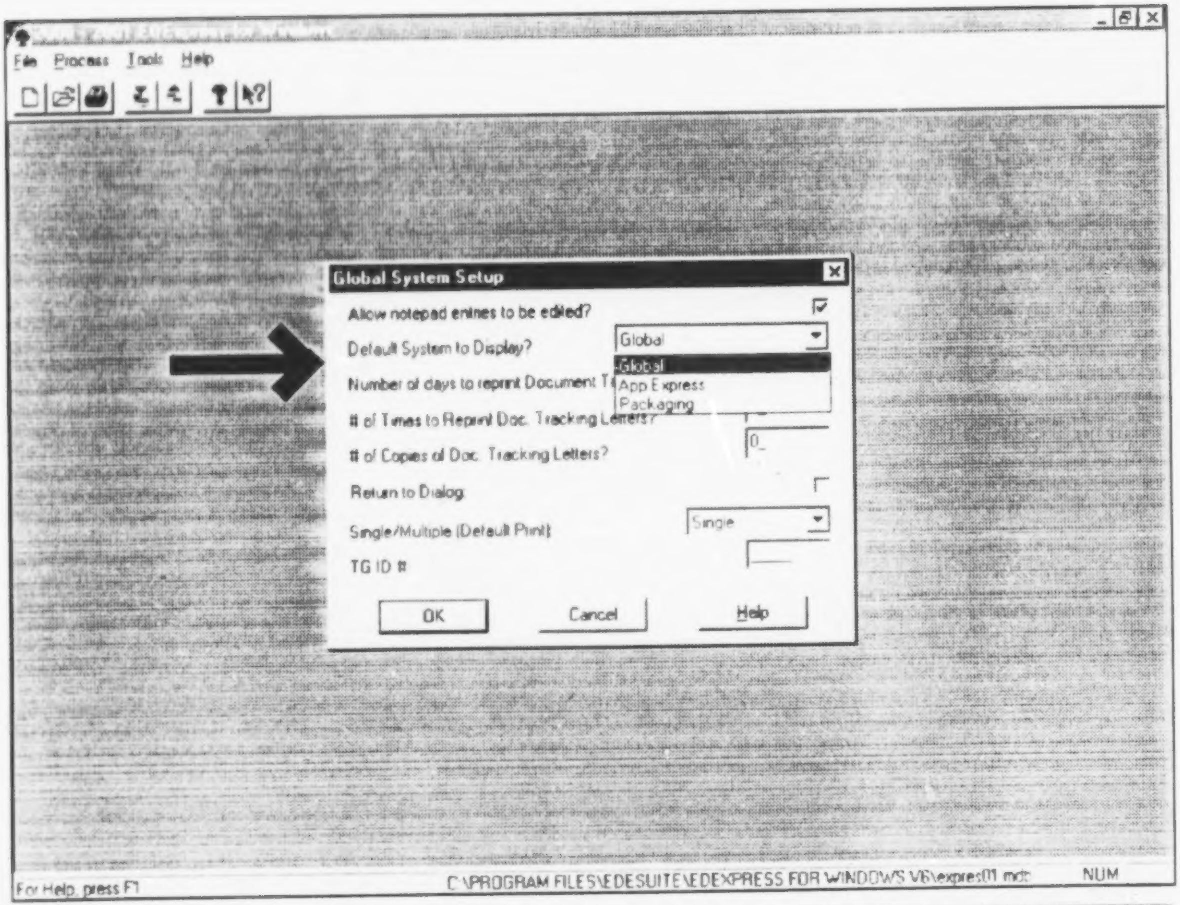
Global System Setup Worksheet

Allow notepad entries to be edited?	☒ Yes ☐ No
Default System to display?	☐ Global ☐ App Express ☒ Packaging ☐ ____________
Number of Days to reprint Document Tracking Letters?	14
Number of Times to reprint Document Tracking Letters?	5
Number of Copies of Document Tracking Letters to Print?	2
Return to Dialog?	☒ Yes ☐ No
Print Default?	☐ Single Record ☒ Multiple Records
TG ID #	59999

The Global System Setup dialog box displays

Click the ***Allow Notepad Entries to be edited?*** *checkbox if you want this option to be available to EDExpress users*

Click the ***Default System to Display?*** *down arrow to select the EDExpress module you want to appear each time you access EDExpress*



Global System Setup

Allow notepad entries to be edited? ☑

Default System to Display? Global

- Global
- App Express
- Packaging

Number of days to reprint Document T

# of Times to Reprint Doc. Tracking Letters?

# of Copies of Doc. Tracking Letters? 0_

Return to Dialog ☐

Single/Multiple (Default Print) Single

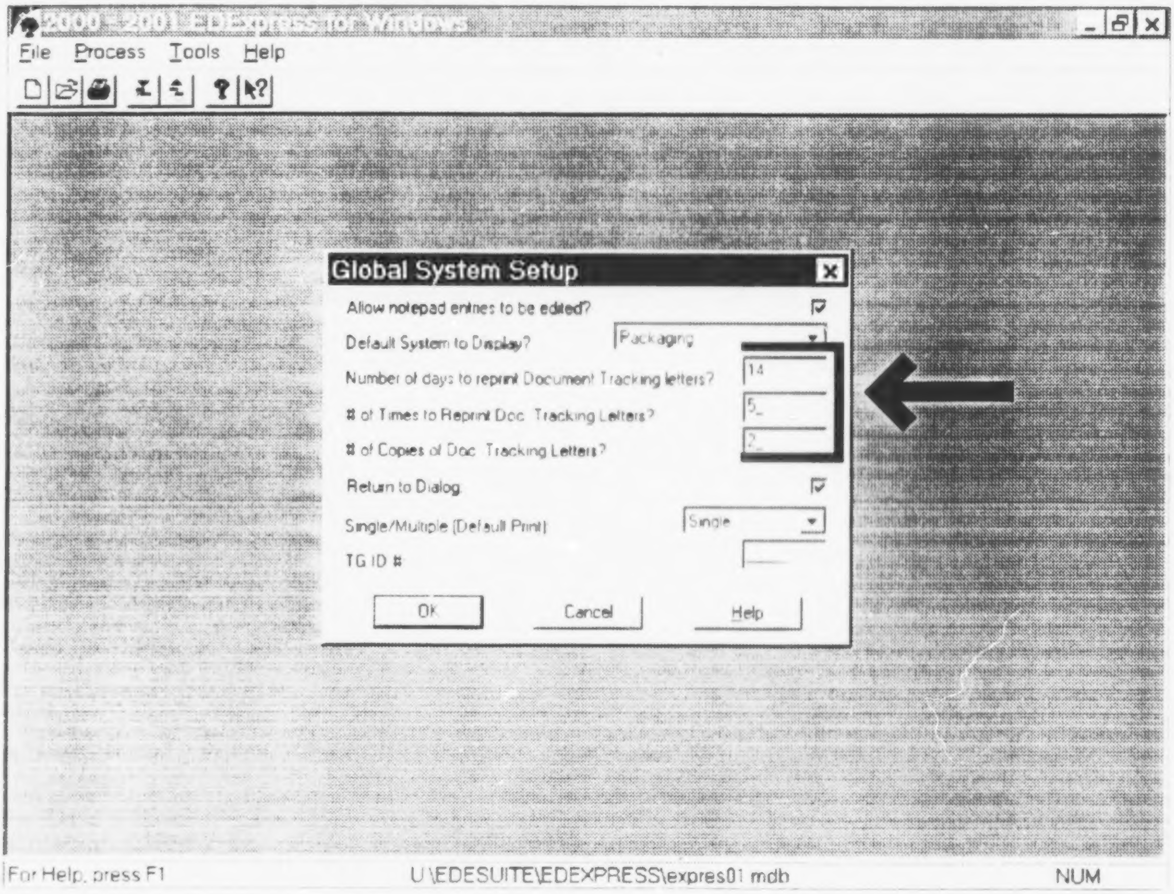
TG ID #

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb NUM

Enter a numeric value in the ***Number of Days to Reprint Document Tracking Letters?*** *field for the number of days to elapse between printings of tracking letters*

Enter a numeric value in the ***# of Times to Reprint Doc Tracking Letters?*** *field for the maximum number of document tracking letters to send*

Enter a numeric value in the ***# of Copies of Doc Tracking Letters?*** *field for the number of copies to print*



Global System Setup

Allow notepad entries to be edited? ☑

Default System to Display? Packaging

Number of days to reprint Document Tracking letters? 14

# of Times to Reprint Doc. Tracking Letters? 5

# of Copies of Doc. Tracking Letters? 2

Return to Dialog ☑

Single/Multiple (Default Print) Single

TG ID #

For Help, press F1 U:\EDESUITE\EDEXPRESS\expres01.mdb NUM

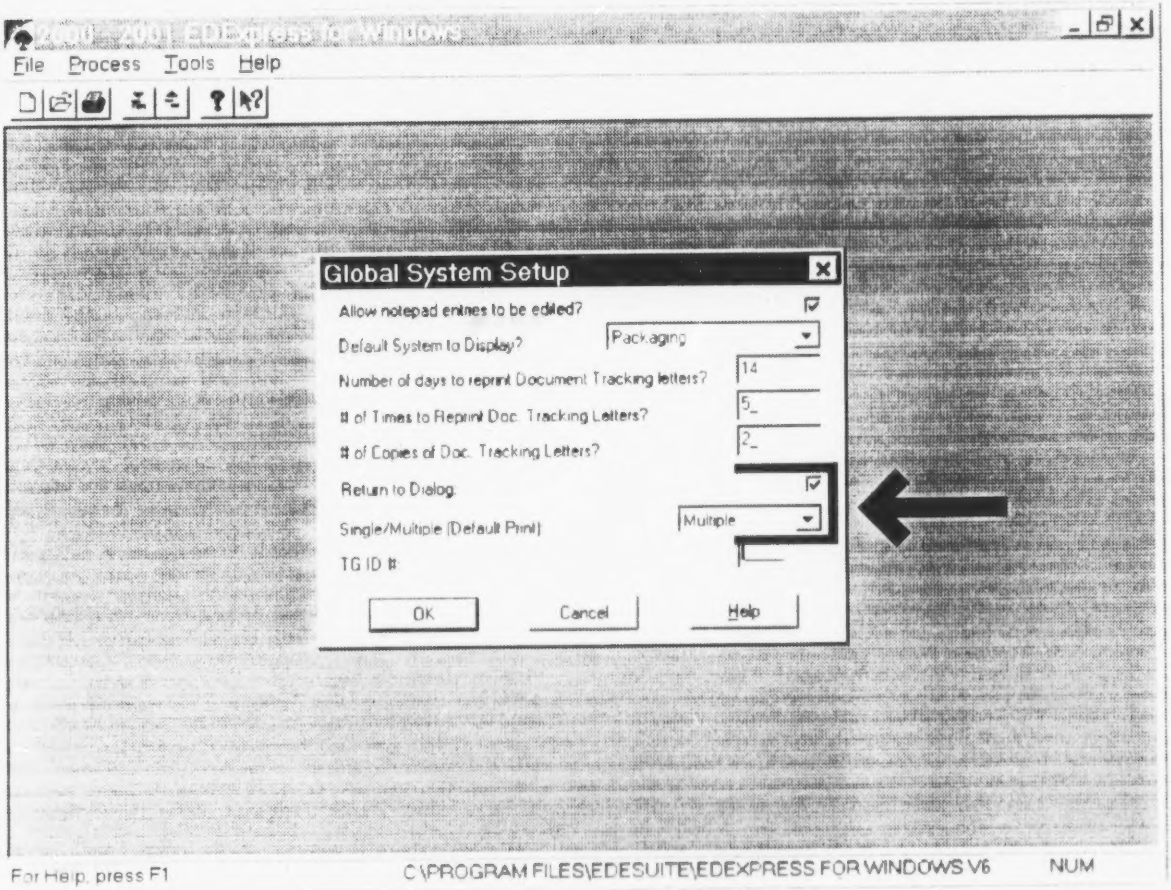
Tip: Select Single for the system Default Print if you usually print one record at a time and you want Single always selected in the Print dialog box

Select Multiple if you usually print multiple records and you want Multiple always selected in the Print dialog box

You can override the system default at any time by changing this setting in the Print dialog box for a specific print job

Click the ***Return to Dialog*** *checkbox to select the option that returns you to a dialog box when you have finished printing, exporting, importing, or using Multiple Entry*

Click the ***Single/ Multiple*** *down arrow to select the setting for system default printing*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

Global System Setup

Allow notepad entries to be edited? ☑

Default System to Display? Packaging

Number of days to reprint Document Tracking letters? 14

# of Times to Reprint Doc. Tracking Letters? 5

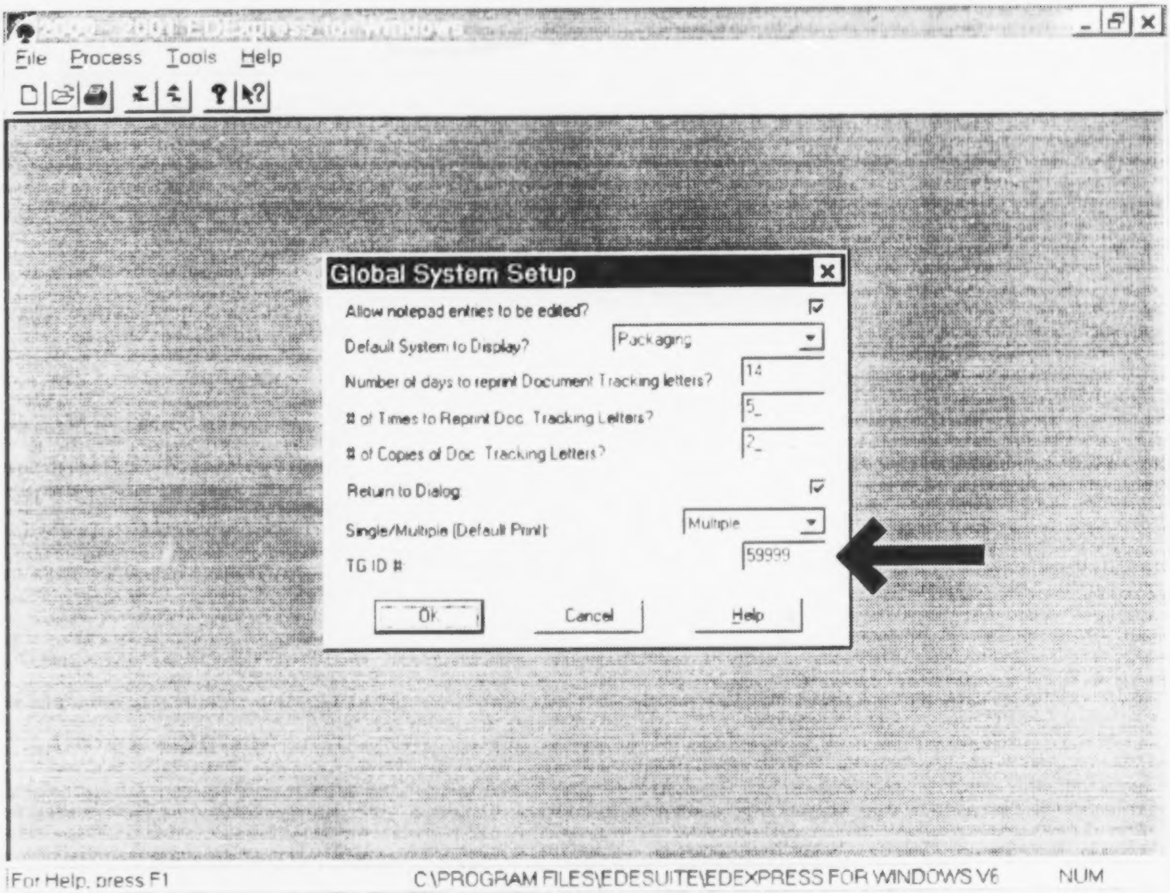
# of Copies of Doc. Tracking Letters? 2

Return to Dialog ☑

Single/Multiple (Default Print) Multiple

TG ID #

Enter the number value of your school's ***TG ID #***


File
Process
Tools
Help
Ok
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

Global System Setup

Allow notepad entries to be edited? ☑

Default System to Display? Packaging

Number of days to reprint Document Tracking letters? 14

# of Times to Reprint Doc. Tracking Letters? 5

# of Copies of Doc. Tracking Letters? 2

Return to Dialog ☑

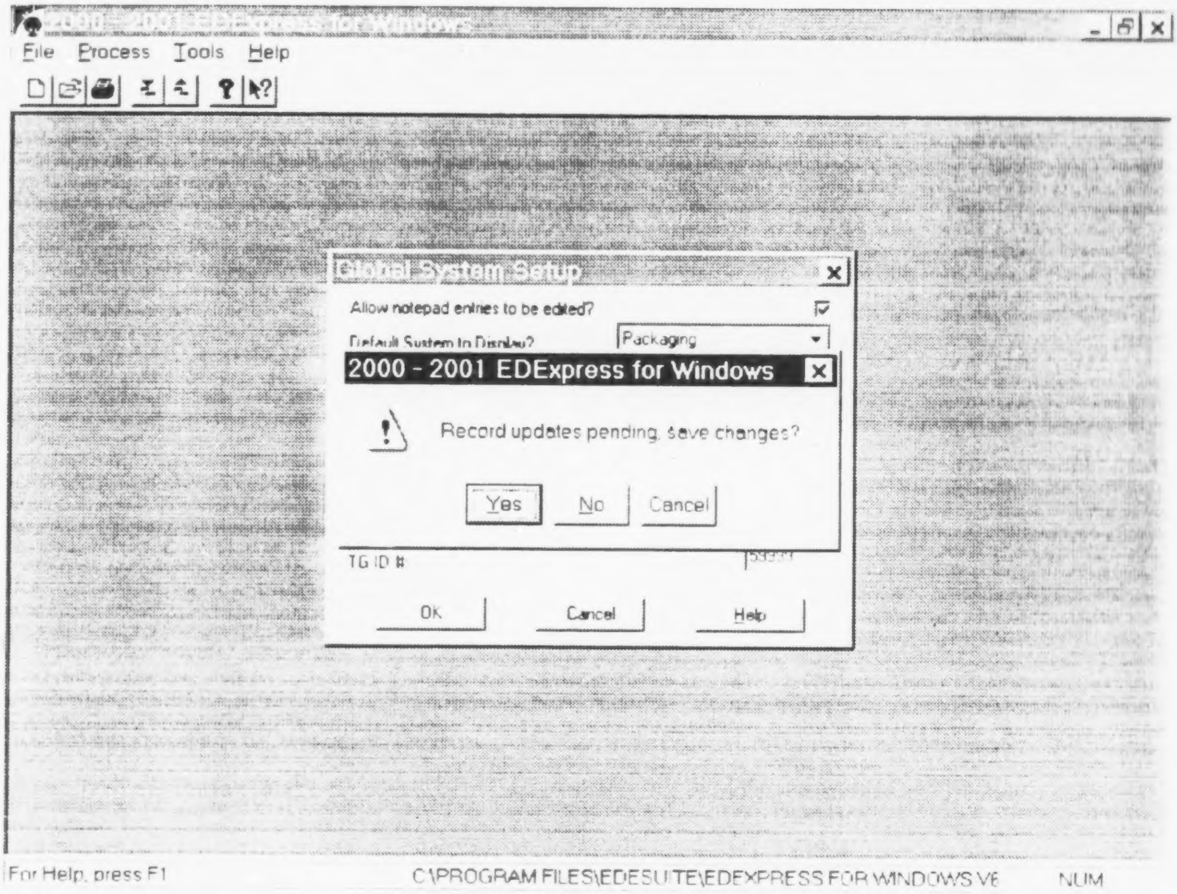
Single/Multiple (Default Print) Multiple

TG ID # 59999

To save the record click ***OK***

The Record Updates Pending, Save Changes? dialog box displays

Click ***Yes***


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Global System Setup

Allow notepad entries to be edited? ☑

Default System to Display? Packaging

2000 - 2001 EDExpress for Windows

Record updates pending, save changes?

Yes
No
Cancel

TG ID # 53333

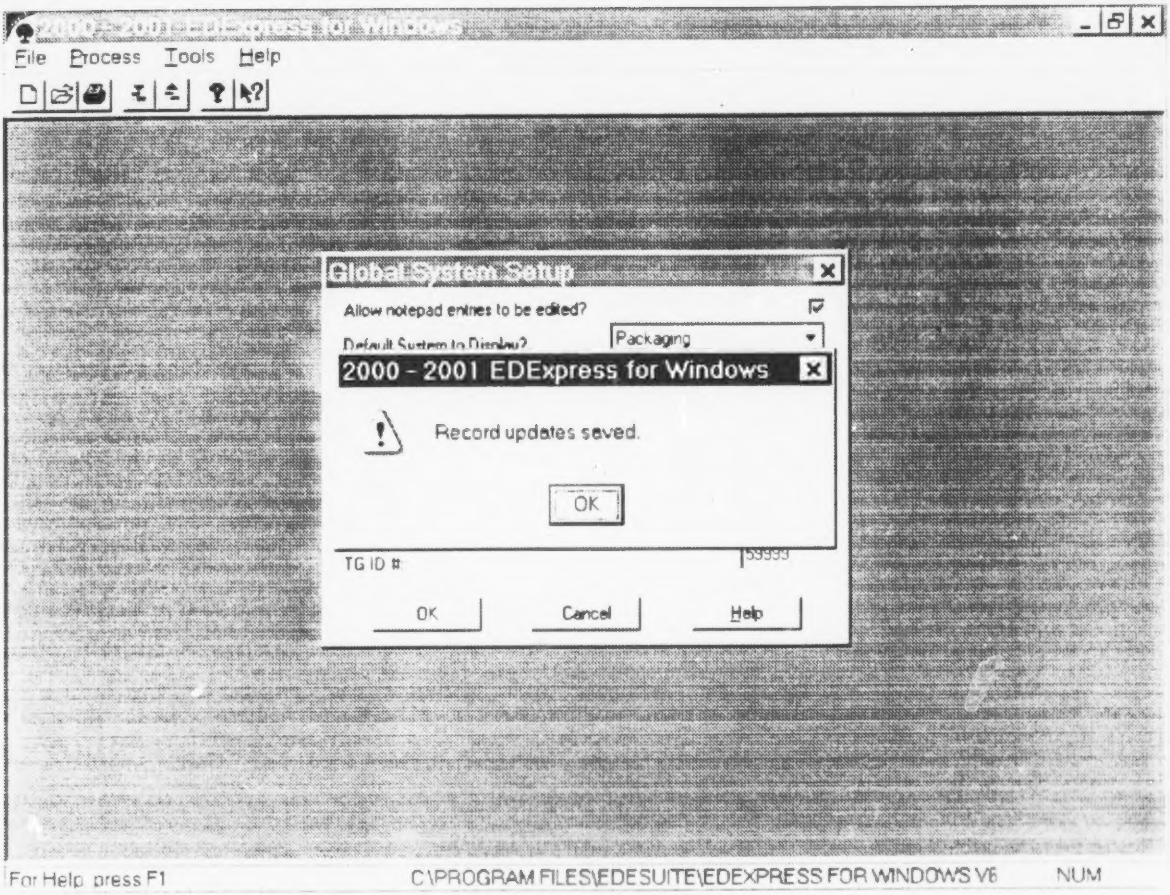
OK
Cancel
Help

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6 NUM

A Records Updates Save dialog box displays

Click ***OK***

The dialog box closes and you are returned to the main menu


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Global System Setup
OK
Cancel
Help

Allow notepad entries to be edited? ☑

Default System to Display? Packaging

2000 - 2001 EDExpress for Windows

Record updates saved.

OK

TG ID # 59999

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6

NUM

User Database

The User Database function allows you to create up to 255 user-defined fields. Because you create these data fields at the Global System level, user-defined data is accessible to all EDExpress modules.

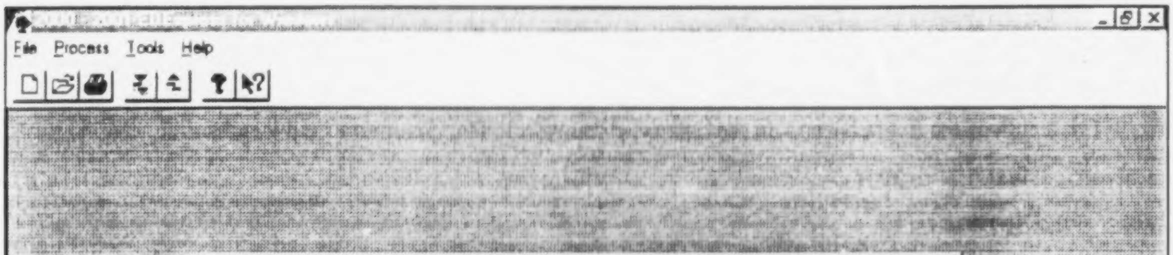
The data entered is stored in your User Database, but you access it by opening a student record in EDExpress and selecting the User Data tab. Here you can add or modify the student's data.

You also can print the data for a single student record, a group of records, or all of the records in EDExpress. Note, however, that the data prints out individual pages/records.

You can delete or add a field at any time, as long as the field isn't used in a query or file format or assigned to a student's record. To modify a user-defined field, you must delete the field and recreate it.

In creating user-defined fields, you should anticipate all possible internal data needs for the upcoming cycle. EDExpress deletes previously stored data when you attempt to change the fields or parameters.

[Slide 2-7]


File
Process
Tools
Help
User Database Setup
Field
Type
Length
Description
1
Add
Delete
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

Each user data field includes four components

- Field name
- Type
- Length
- Description

Field Name

The field name can include up to 20 alphanumeric characters The first character must be an alpha character

Type

Valid data types stored in user-defined fields include Date, Numeric, Text, and Yes or No (Because the database system stores the Yes value as "True" and the No value as "False", use True or False when querying on this Yes or No field type)

If you want a field to contain a decimal, such as the student's GPA, choose Text for the field type

Length

The length of the field depends on the data type you select The maximum field lengths are

Text	40
Numeric	10
Date	8 (system default)
Y/N	1 (system default)

Description

The description can be up to 50 alphanumeric characters in length This description displays when you view the user-defined field from the User Data screen

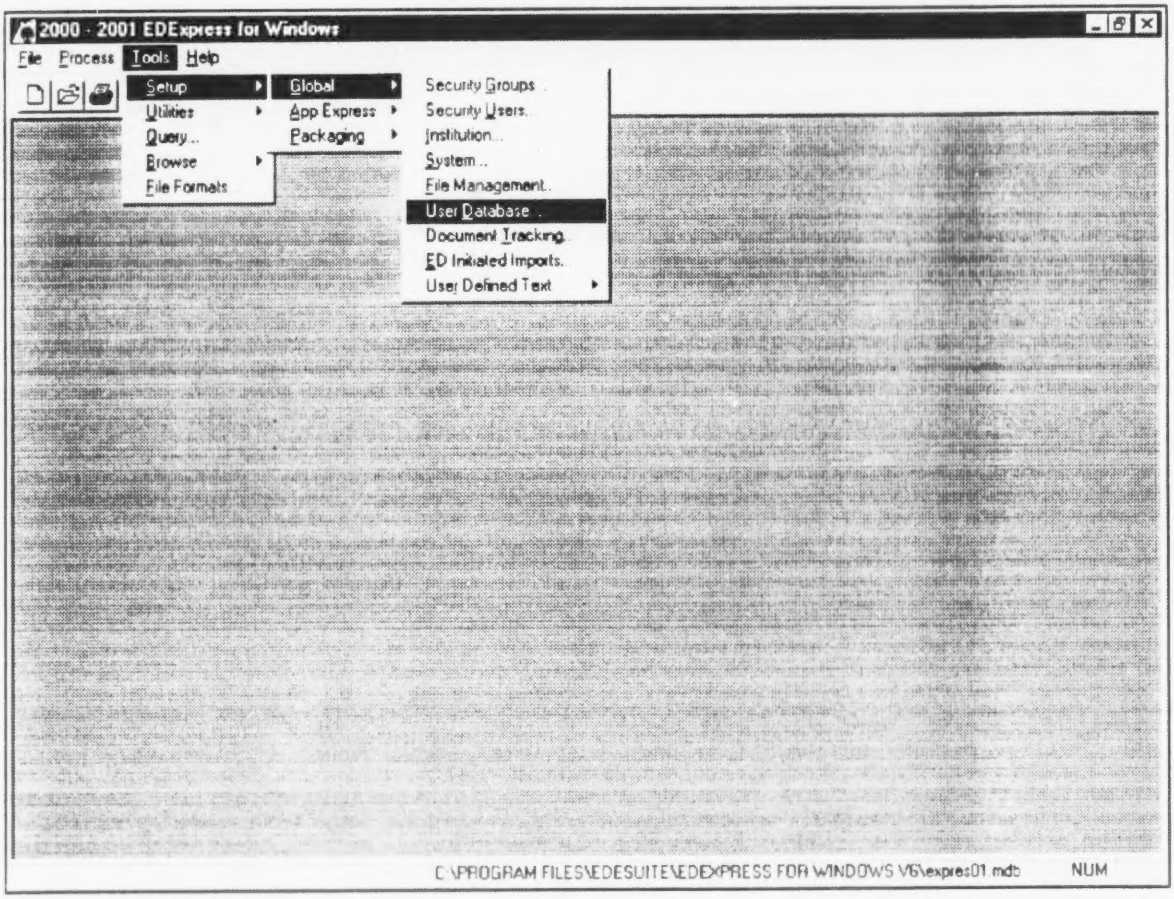
Creating User-defined Fields

Here's an example of how you might use this feature for packaging financial aid awards. Let's say you want to award a particular institutional grant (or fund) to students with a minimum GPA of 3.25 and who have earned at least 60 credits. First, you create user data fields for GPA and credits earned. Then, you populate these fields manually or with an external data import. Once user data fields are created and populated, you create a query that selects students who meet the GPA and credits earned criteria of the fund. Finally, you package the fund based on this query.

To create a user defined field

Select ***Tools/Setup/Global/User Database*** *from the menu bar*

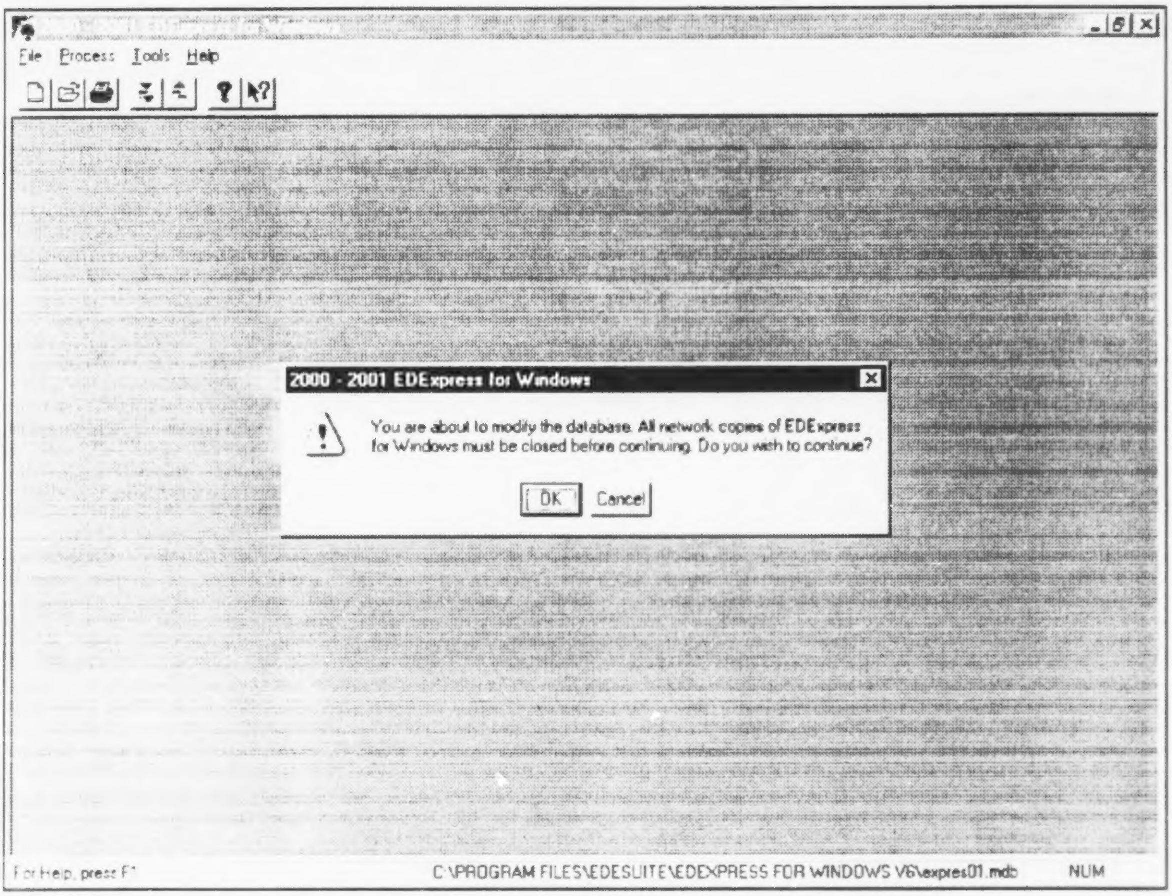
Let's create fields to store GPAs and credits earned.


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Setup
Utilities
Query...
Browse
File Formats
Global
App Express
Packaging
Security Groups...
Security Users...
Institution...
System...
File Management...
User Database...
Document Tracking...
ED Initiated Imports...
User Defined Text
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

Once you verify that all other users have closed out of EDExpress, click ***OK*** *to continue*

Each time you access this function, you get a message warning you that no other copies of EDExpress should be open

This message applies only to EDExpress systems that are networked, but not to stand alone systems



2000 - 2001 EDExpress for Windows

You are about to modify the database. All network copies of EDExpress for Windows must be closed before continuing. Do you wish to continue?

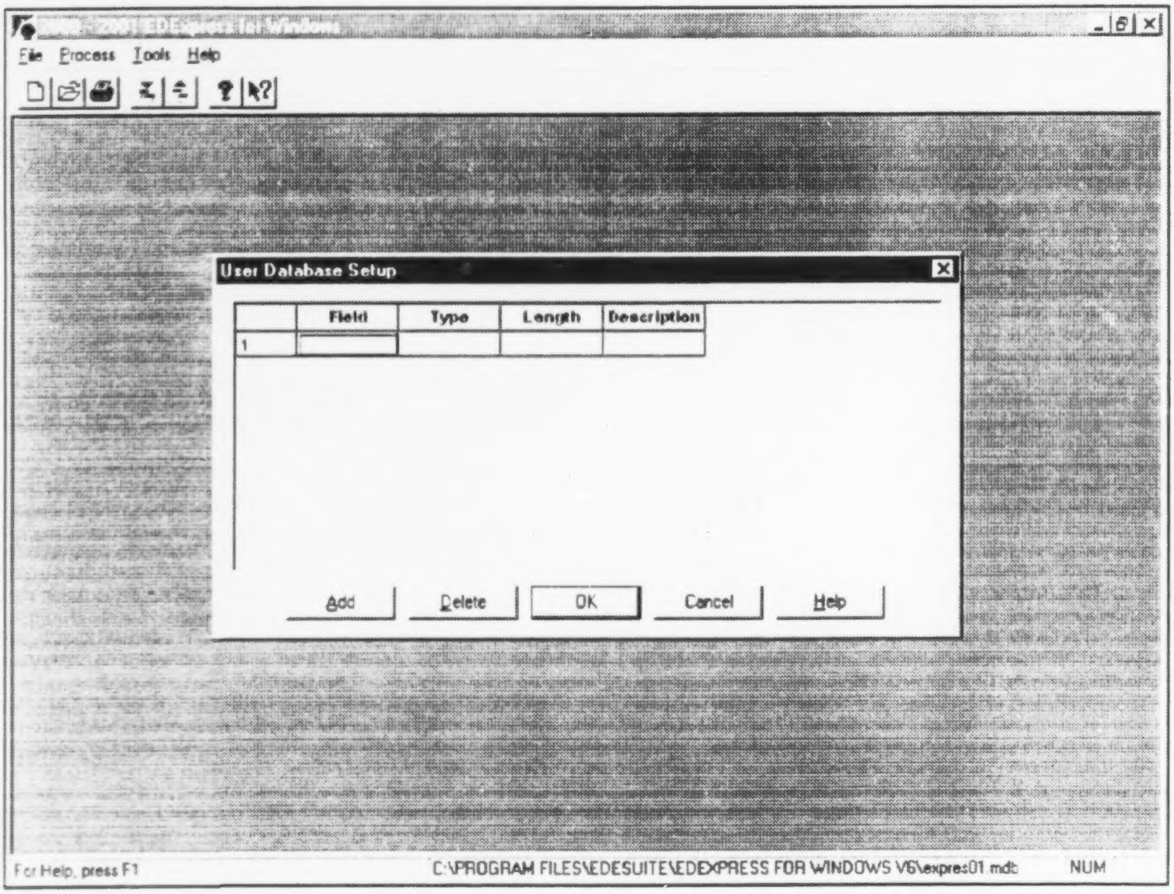
For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

The User Database Setup dialog box displays.

*For each data field, enter **Field**, **Type**, **Length**, and **Description**.*

Remember: *This setup is optional.*


2000-2001 EDExpress for Windows
File Process Tools Help
User Database Setup
Add
Delete
OK
Cancel
Help

	Field	Type	Length	Description
1				

For Help, press F1   C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb   NUM

Let's start with GPA

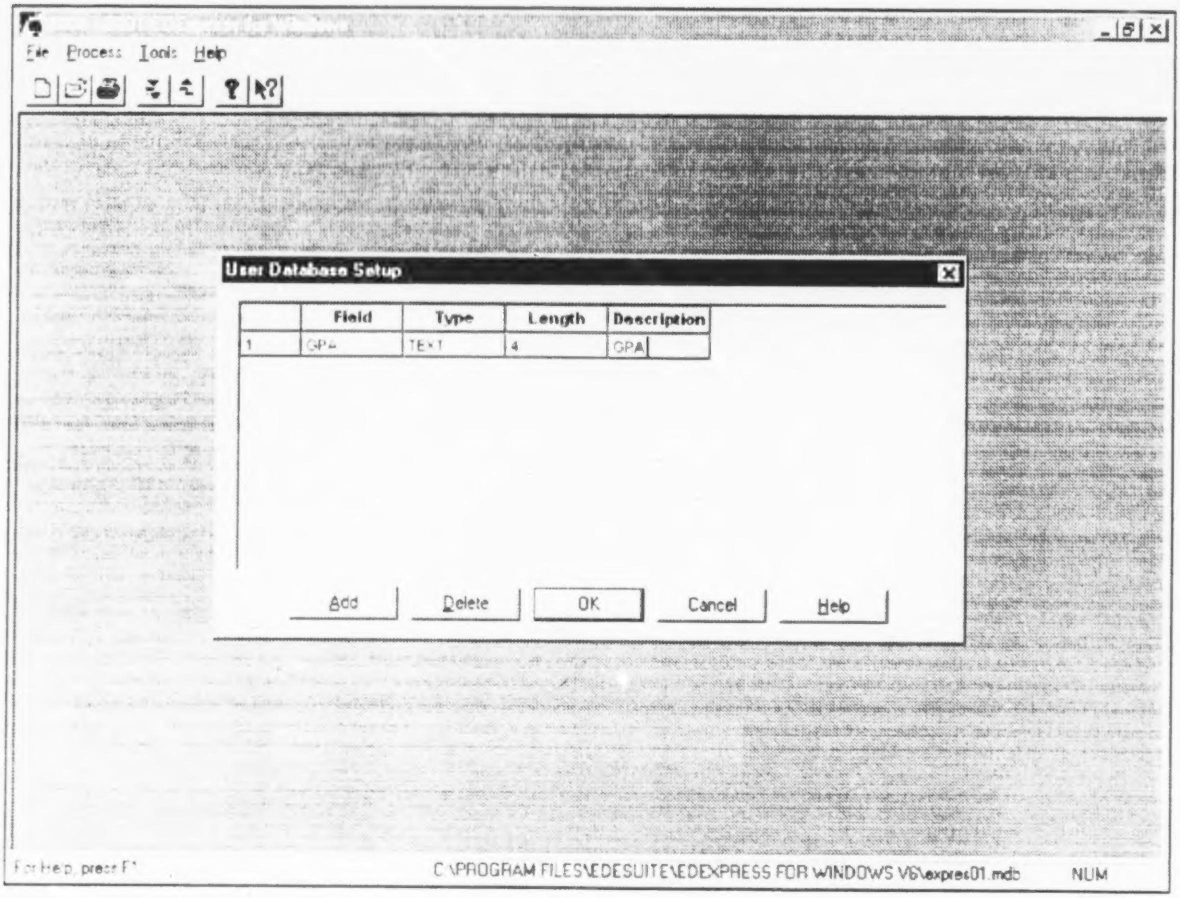
For **Field**, enter GPA, the field label in the database

For **Type**, enter Text

For **Length**, enter 4

For **Description**, enter GPA, the description you see when viewing a student's record

Remember: *If you want the field to include decimal places, you must select Text.*


File
Process
Tools
Help
User Database Setup
Add
Delete
OK
Cancel
Help
NUM

	Field	Type	Length	Description
1	GPA	TEXT	4	GPA

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

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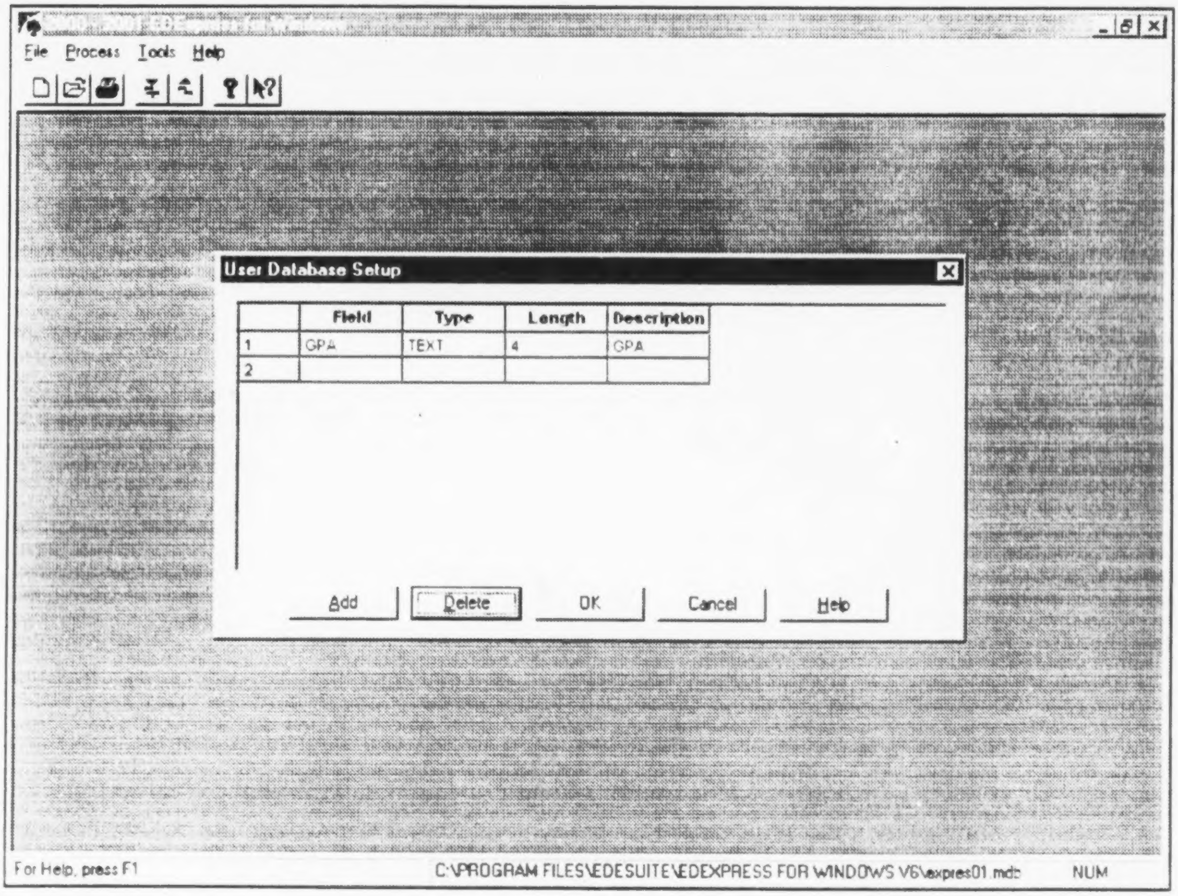
To add another field

*Click **Add***

The system automatically adds a blank row



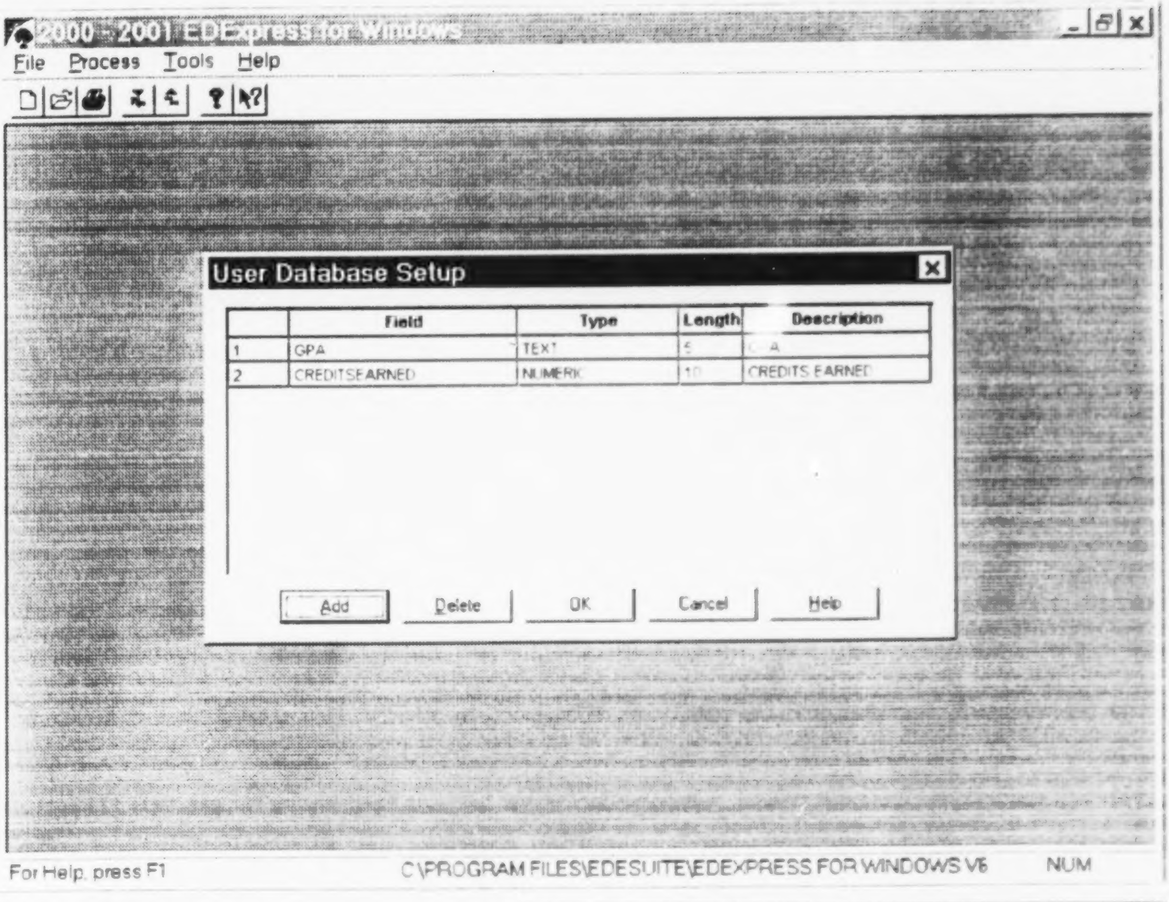
File
Process
Tools
Help
User Database Setup
Add
Delete
OK
Cancel
Help
For Help, press F1
NUM

	Field	Type	Length	Description
1	GPA	TEXT	4	GPA
2				

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

Enter the required information

*To save your changes click **OK***



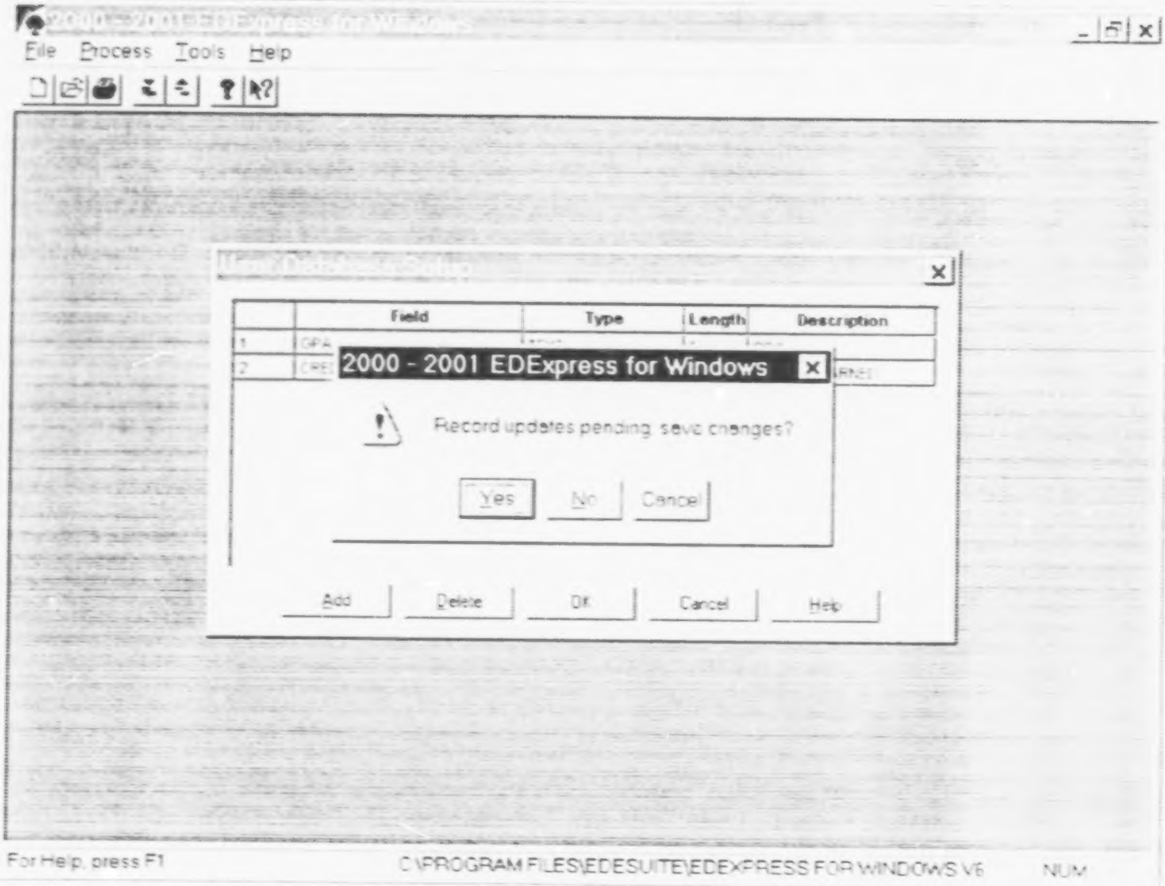
2000 - 2001 EDExpress for Windows
File Process Tools Help
User Database Setup
Add Delete OK Cancel Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

	Field	Type	Length	Description
1	GPA	TEXT	5	GPA
2	CREDITSEARNED	NUMERIC	10	CREDITS EARNED

A Records Updates Pending: Save Changes dialog box displays

Click **Yes**

The dialog box closes and you are returned to the main menu



2000 - 2001 EDExpress for Windows

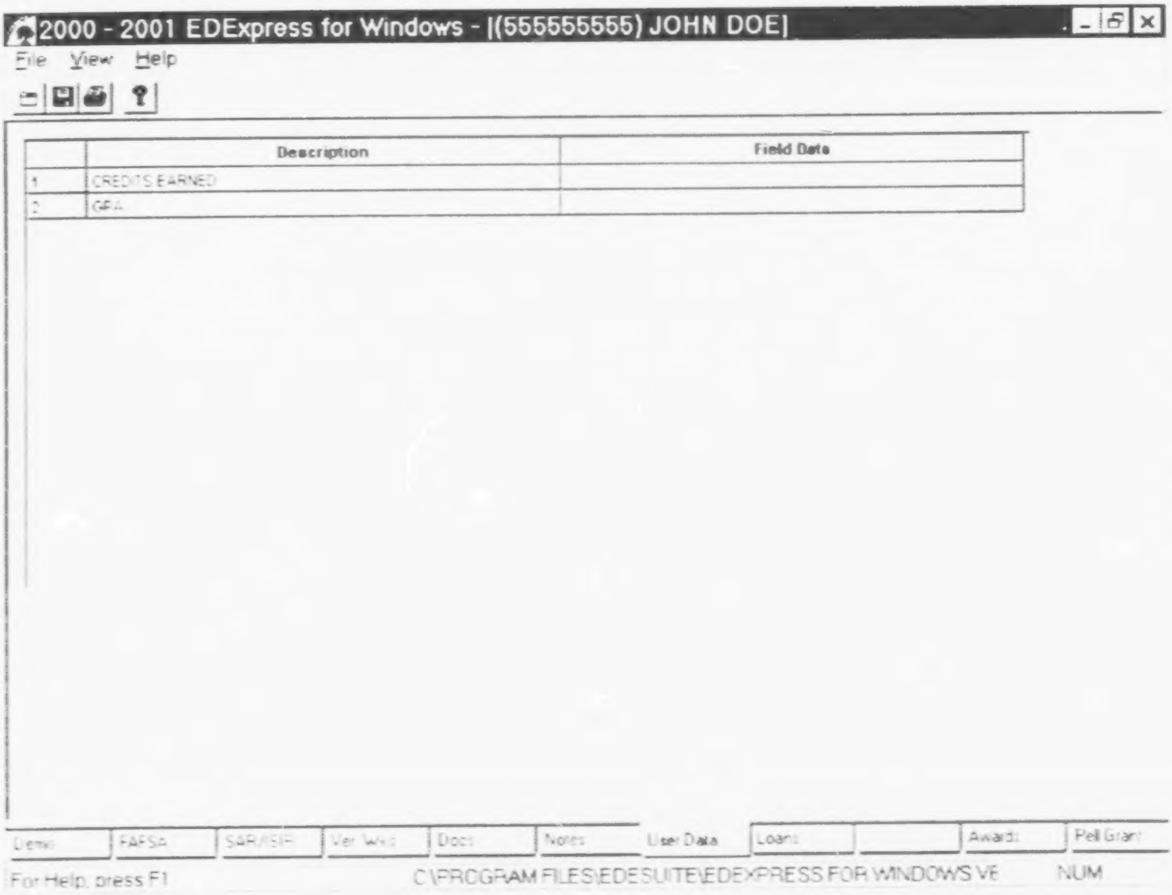
Record updates pending, save changes?

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6

File
Process
Tools
Help
Field
Type
Length
Description
Yes
No
Cancel
Add
Delete
OK
Cancel
Help
NUM

Here's an example of what you see when viewing a student's User Data sheet in EDExpress. Remember, at this point, we've only created the user-defined field; we haven't added any data yet.


2000 - 2001 EDExpress for Windows - [(555555555) JOHN DOE]
File
View
Help
Demo
FAFSA
SAR/ISIR
Ver Wks
Docs
Notes
User Data
Loans
Awards
Pell Grant
NUM

	Description	Field Data
1	CREDITS EARNED	
2	GPA	

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS VE

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Documents

To satisfy documentation requirements and meet institutional information needs, students may need to provide documents to the financial aid administrator. These documents might include tax returns for verification, an institutional application, a loan entrance interview, etc.

Using the Document Tracking function of EDExpress, you can:

- Create as many documents as are required
- Assign documents by using the Add Documents batch process, the Multiple Entry batch process, or manual entry
- Create document tracking letters
- Print document tracking letters
- Print a document tracking list by student or by document code
- Track the request and receipt of these documents

Although Document Tracking is a global feature of the software and is not specific to Packaging functions, it can be a highly effective tool when integrated into your packaging process. Before creating documents in the software, think through how you plan to use this tracking tool.

- Will the document(s) you track be needed before students can be packaged?
- Will there be other documents that are not necessarily required for packaging but that will be required before aid can be disbursed to the student?

Then, make a list of all the documents you want to track and answer the following questions for each.

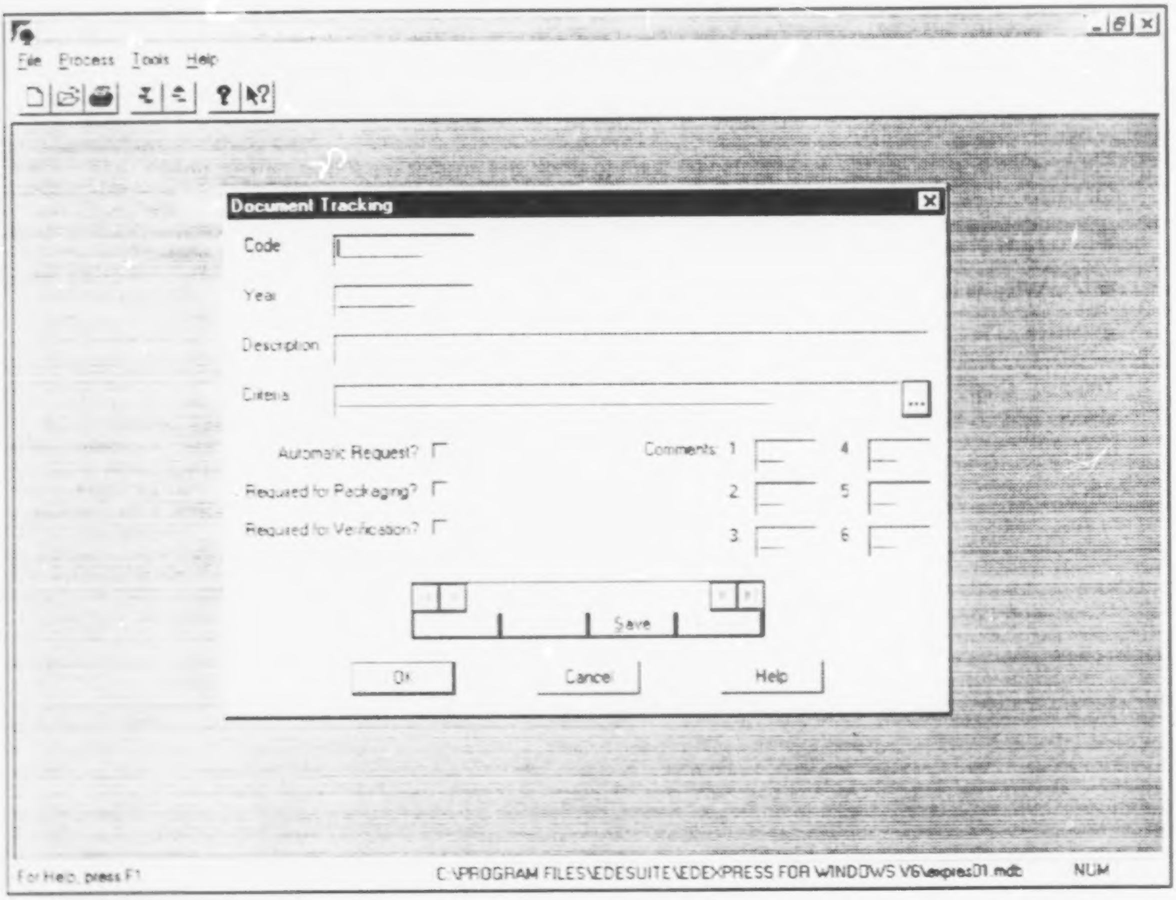
- How often do you want to send out document tracking letters requesting the documents?
- What is the maximum number of times these requests will be sent?
- How many copies of the document tracking letters do you want the system to print?

You may already have defined some of these parameters in Global System Setup, but you always can go back and modify them. Remember, however, that any changes to you make to the Global System Setup only impact processes performed from that point on.

[Slide 2-8]

After you answer these questions, you still won't be ready to create documents in EDExpress. You still have to define the components involved in setting up a document. For each document you set up and add to the EDExpress system, you define:

- Code
- Year
- Description
- Criteria
- Automatic Request
- Required for Packaging?
- Required for Verification?
- Comment Code(s)


File
Process
Tools
Help
Document Tracking
Code
Year
Description
Criteria
Automatic Request? ☐
Required for Packaging? ☐
Required for Verification? ☐
Comments: 1
2
3
4
5
6
Save
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

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Code

The document code is a required field that identifies the document profile. The code you select can include up to 10 alphanumeric characters. When space is available, this code prints on reports and displays on screens.

You cannot modify the code once the document record is saved. To change a code, you must delete the document and start over. However, you can only delete a document that has not been assigned to a student record.

Year

The year identifies the award year for which the document is tracked and appears on the document tracking letter. The year is optional.

Description

The document description is a required field. The description you enter, up to 50 alphanumeric characters, appears on document tracking letters.

Criteria

Using Criteria allows you to use a query created in the Apps Module to identify students who should receive a request for this document.

Automatic Request

Selecting the Automatic Request option instructs the system to assign the document according to the query you specify under Criteria and/or to the ISIR comment codes under Comment.

[Slide 2-9]

Required for Packaging

This option allows you to require that the document be tracked as received or waived before a student's aid can be packaged. When you select this option, you also must select either the Automatic Request option *or* the Required for Verification option to have the document assigned.

A document required for packaging cannot be added to a student record that already has been packaged.

Required for Verification

This option has the system assign the document to students selected for verification, i.e., the Pell Verification Status field on the demographic record is not equal to N

If you select this option, you do not also have to select the Automatic Request option

Also, if you assign the document to all students selected for verification, without regard to dependency status, no selection criteria is needed

Comments

This option allows you to assign documents based on comment codes on the ISIR. You can associate up to six comment codes with this document. If you include more than one comment code, EDExpress adds the document when *any* of the comment codes you include are on the student's ISIR

If you select both the Criteria and Comment options, EDExpress adds the document only if the student's demographic record meets the selection criteria and if the student's ISIR has at least one of the comment codes

[Slide 2-10]

Document Status Codes

Each document assigned to a student record has a status in EDExpress. This status determines if the document is going to be tracked and requested when document tracking letters are printed. Possible status values are

N — Needed

I — Incomplete

R — Received

W — Waived

When documents are added by manual entry or by using the Add Documents process, the system defaults to a document status of N, Needed. By using Multiple Entry, you can set the default status for documents being added, and you can update the status of documents already assigned

A document status of Needed (N) or Incomplete (I) indicates that the document should be tracked. In addition, a student record assigned a document with a status of Needed or Incomplete cannot be packaged

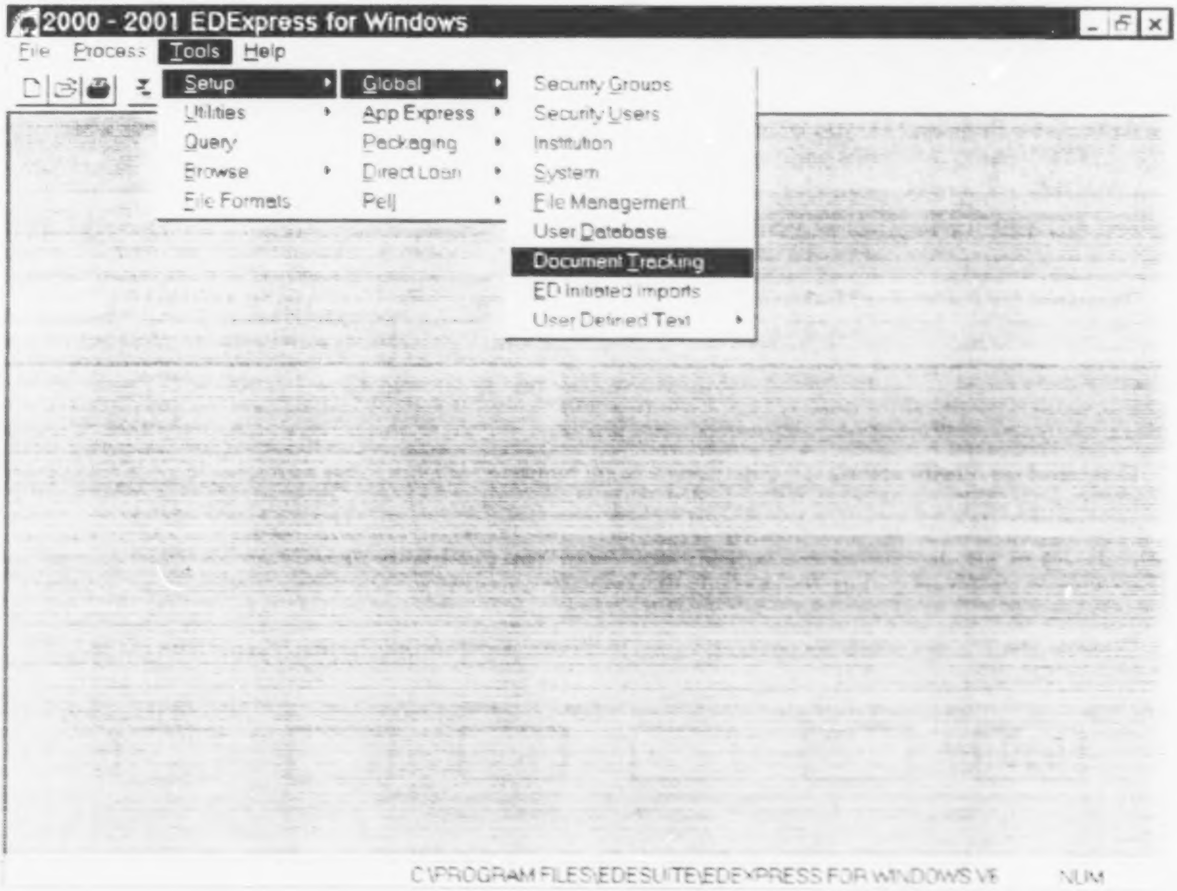
[Slide 2-11]

Creating a Document

Let's review the steps to creating a document. In this example, we want a document to request and track the receipt of evidence that male applicants have registered with Selective Service. (Refer to the Sample Document Tracking Worksheet on the following page.)

To create a document record

Select ***Tools/Setup/ Global/Document Tracking*** *on the menu bar*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Setup
Utilities
Query
Browse
File Formats
Global
App Express
Packaging
Direct Loan
Pell
Security Groups
Security Users
Institution
System
File Management
User Database
Document Tracking
ED Initiated Imports
User Defined Text
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

Document Tracking Worksheet

1. **Document Code:** This code displays on reports and on the Document Tracking tab of the student's record (10-character alphanumeric).

Document Code: SS Reg

2. **Year:** Enter the year(s), if applicable, that applies to the document begin requested. This prints on reports and on the Document Tracking tab of the student's record (9-character alphanumeric).

Year: 2000-2001

3. **Description:** Enter a free-form description of the document. The description prints on the Document Tracking letter as the item being requested (50-character alphanumeric).

Description: Proof of Selective Service Registration

4. **Criteria:** Enter title of query that selects student records that the document tracking code is assigned.

Criteria: Male Applicants

5. **Automatic Request?** Do you want this document to be added automatically to student records when the Add Documents function is performed?

Automatic Request? Yes ☒ No ☐

6. **Required for Packaging?** Is this document required before your office packages financial aid for students to which the document is assigned?

Required for Packaging? Yes ☒ No ☐

7. **Required for Verification?** Is this document being requested of all students who have been selected for verification by CPS?

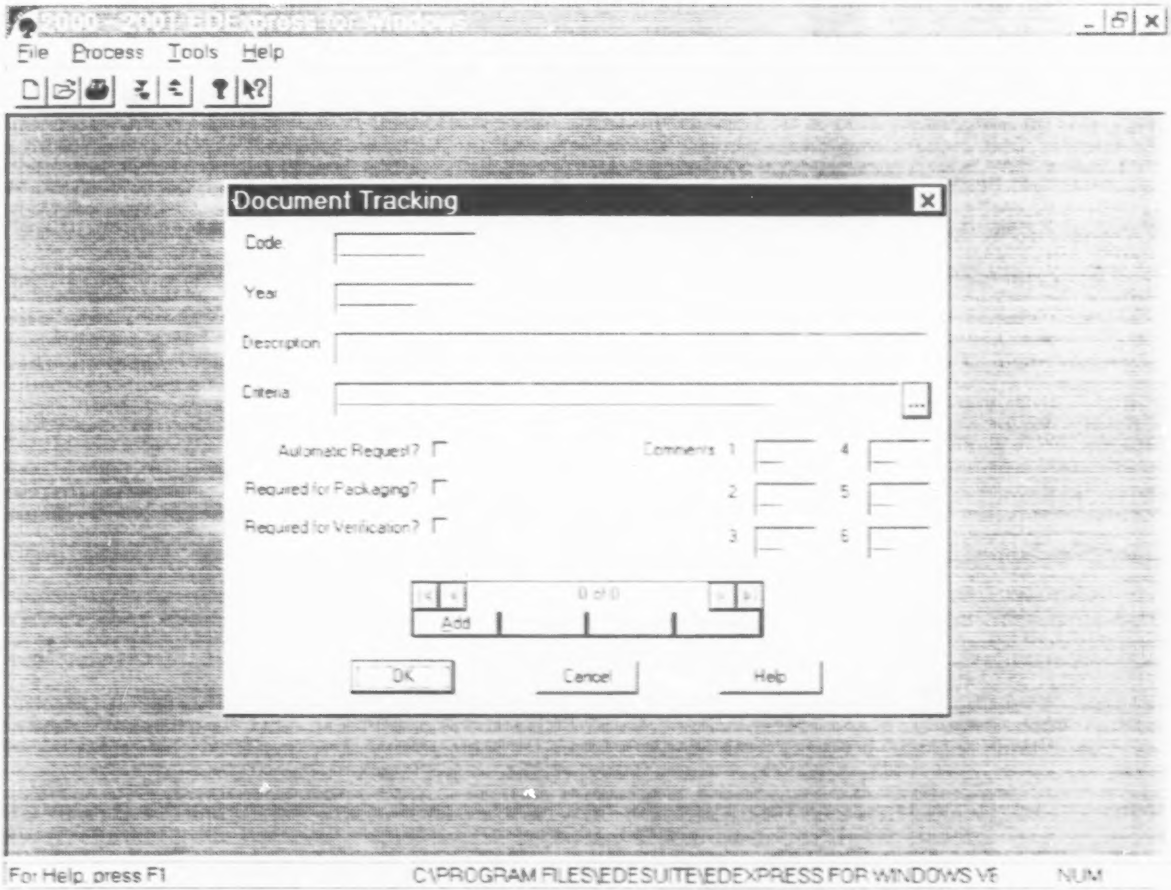
Required for Verification? Yes ☐ No ☐

8. **Comments:** This document should be assigned to those student records having one or more of the following ISIR comment codes:

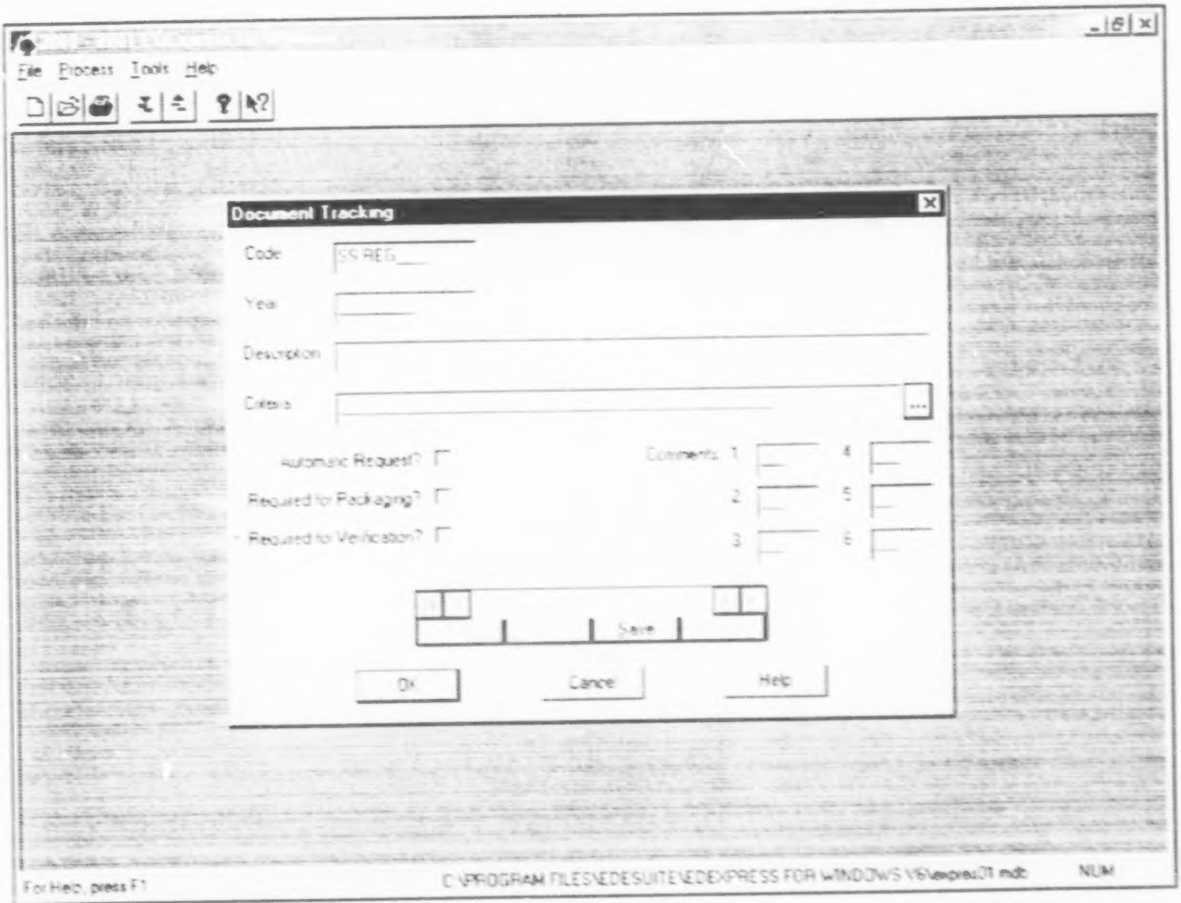
030					

The Document Tracking dialog box displays.

*If document tracking records already exist in the system, select **Add** to enter a new record.*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Document Tracking
Code
Year
Description
Criteria
...
Automatic Request? ☐
Required for Packaging? ☐
Required for Verification? ☐
Comments 1
2
3
4
5
6
0 of 0
Add
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

*Enter a unique **Code** of up to 10 alphanumeric characters to identify this document.*

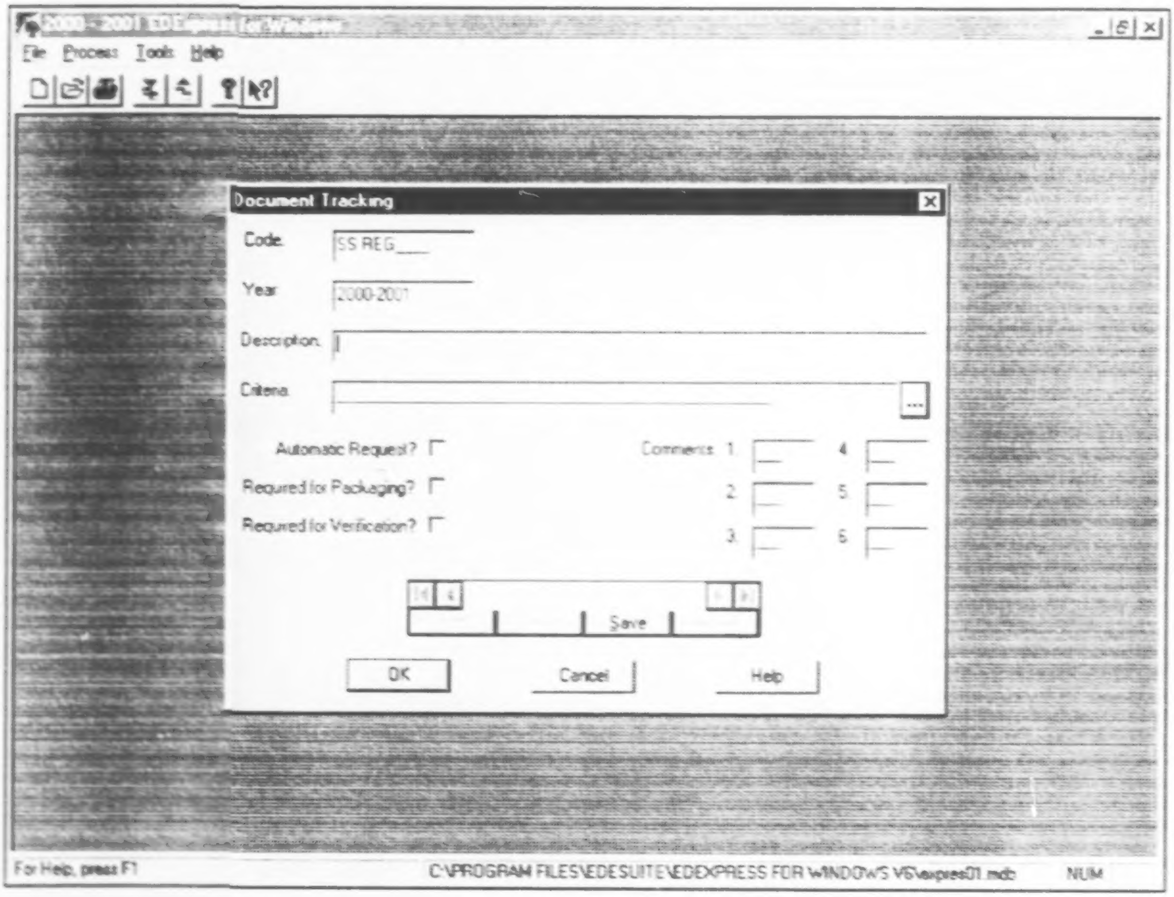


Code: SS REG

File
Process
Tools
Help
Document Tracking
Year
Description
Criteria
Automatic Request?
Required for Packaging?
Required for Verification?
Comments
1
2
3
4
5
6
Save
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

The value in the Year field prints along with a description of the document on the document tracking letter

*In the **Year** field, enter the award year to which this document applies (optional)*



2000 - 2001 EDExpress for Windows
File Process Tools Help
Document Tracking
OK
Cancel
Help
Save

Code: SS REG

Year: 2000-2001

Description:

Criteria:

Automatic Request? ☐

Required for Packaging? ☐

Required for Verification? ☐

Comments 1. 2. 3. 4. 5. 6.

For Help, press F1

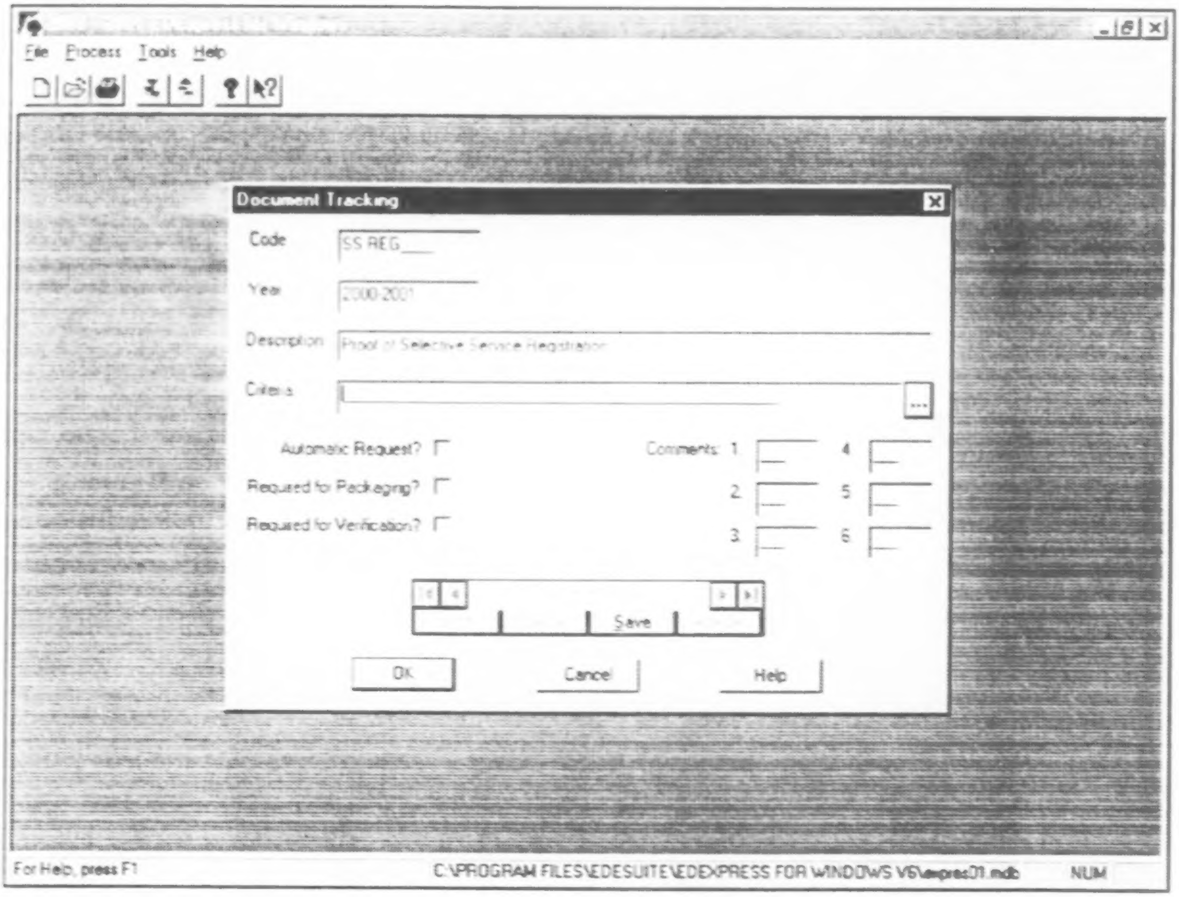
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb NUM

Enter a complete ***Description*** *of the document (up to 50 alphanumeric characters).*

To request this document from a specific student population, use a query. In the ***Criteria*** *field, enter a query name.*

Remember: *Only queries that you create in the Apps Module are available for use as Document Criteria.*

Tip: *Because this description prints on document tracking letters, be sure it is detailed enough for students to understand what you are requesting.*



File Process Tools Help
Document Tracking
Automatic Request?
Required for Packaging?
Required for Verification?
Comments: 1 2 3 4 5 6
Save
OK
Cancel
Help
For Help, press F1
NUM

Code: SS REG

Year: 2000-2001

Description: Proof of Selective Service Registration

Criteria:

☐ Automatic Request?

☐ Required for Packaging?

☐ Required for Verification?

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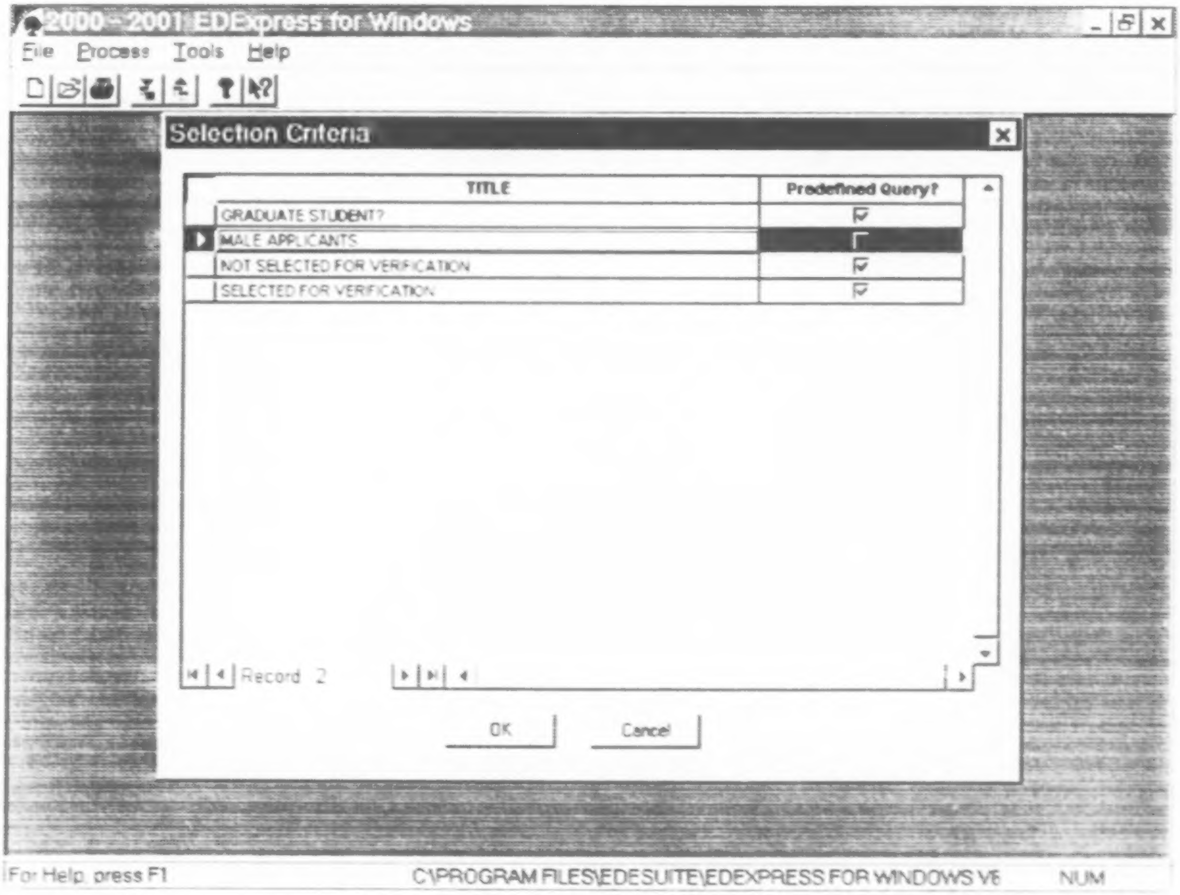
Note that the query Male Applicants is user-defined and was created in the software for the purpose of this demonstration

*Or click the **ellipsis button** to display a list of all the queries in your App Express database*

*Click the appropriate query **Title**, then click **OK***


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Selection Criteria
Record 2
OK
Cancel

TITLE	Predefined Query?
GRADUATE STUDENT?	☑
MALE APPLICANTS	☐
NOT SELECTED FOR VERIFICATION	☑
SELECTED FOR VERIFICATION	☑

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6 NUM

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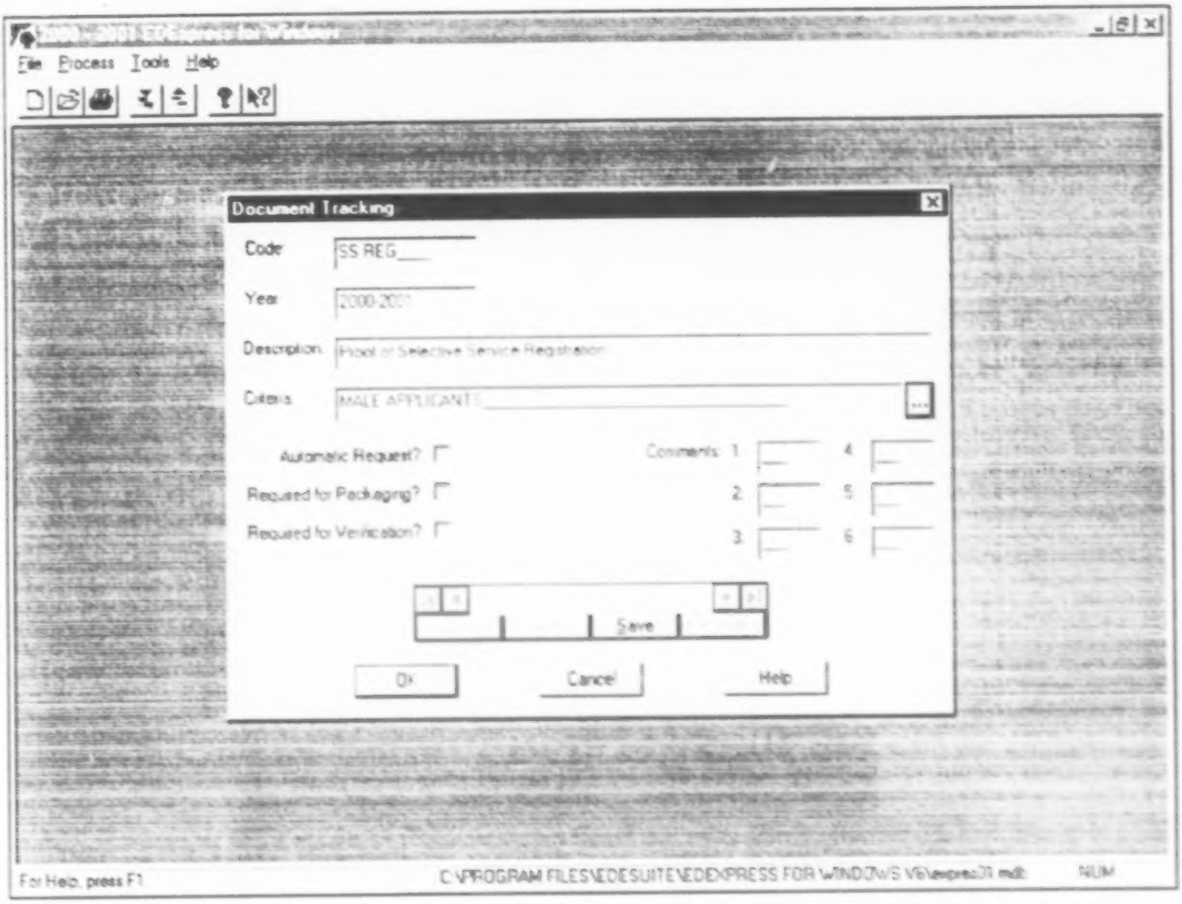
The title of the query you select displays in the Criteria box

The query displayed in Criteria selects male students only, since you would not track Selective Service registration for females


2000-2001 EDExpress for Windows
File Process Tools Help
Document Tracking
OK
Cancel
Help
Save
For Help, press F1
NUM

Code: SS REG

Year: 2000-2001

Description: Proof of Selective Service Registration

Criteria: MALE APPLICANTS

Automatic Request? ☐

Required for Packaging? ☐

Required for Verification? ☐

Comments: 1 2 3 4 5 6

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

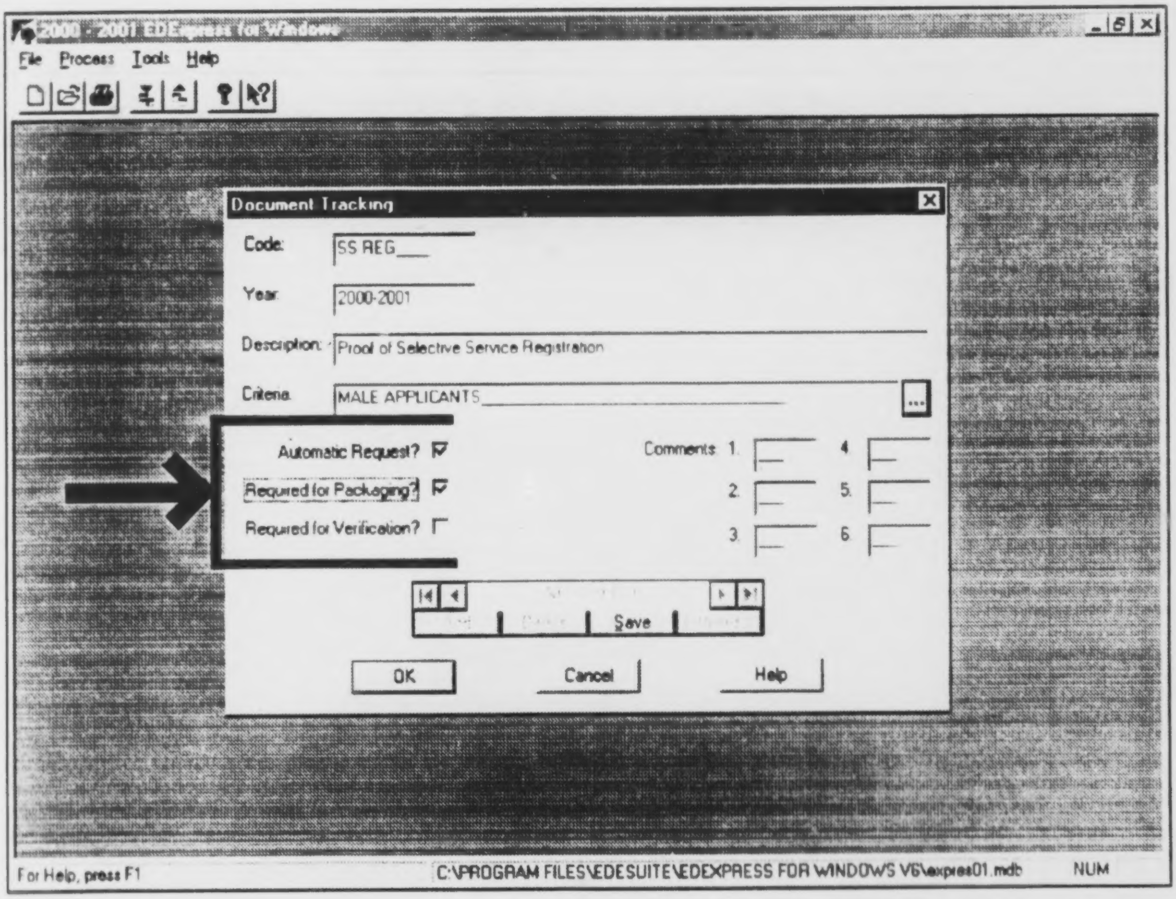
Remember: When you select the Required for Packaging option, you must also select either the Automatic Request option or the Required for Verification option

To select any of the following options, click the appropriate checkboxes

Automatic Request?
Assigns the document according to the query specified under Criteria and/or ISIR comment codes entered under Comments

Required for Packaging?
Requires that the document be tracked as received or waived before a student's aid can be packaged. If this option is selected, you also must select either the Automatic Request option or the Required for Verification option

Required for Verification?
Assigns the document to students selected for verification. When this option is selected, the Automatic Request option is not necessary


2000 - 2001 EDExpress for Windows
File Process Tools Help
Document Tracking
Comments 1. 2. 3. 4. 5. 6.
Save
OK
Cancel
Help
For Help, press F1
NUM

Code: SS REG

Year: 2000-2001

Description: Proof of Selective Service Registration

Criteria: MALE APPLICANTS

Automatic Request? ☑

Required for Packaging? ☑

Required for Verification? ☐

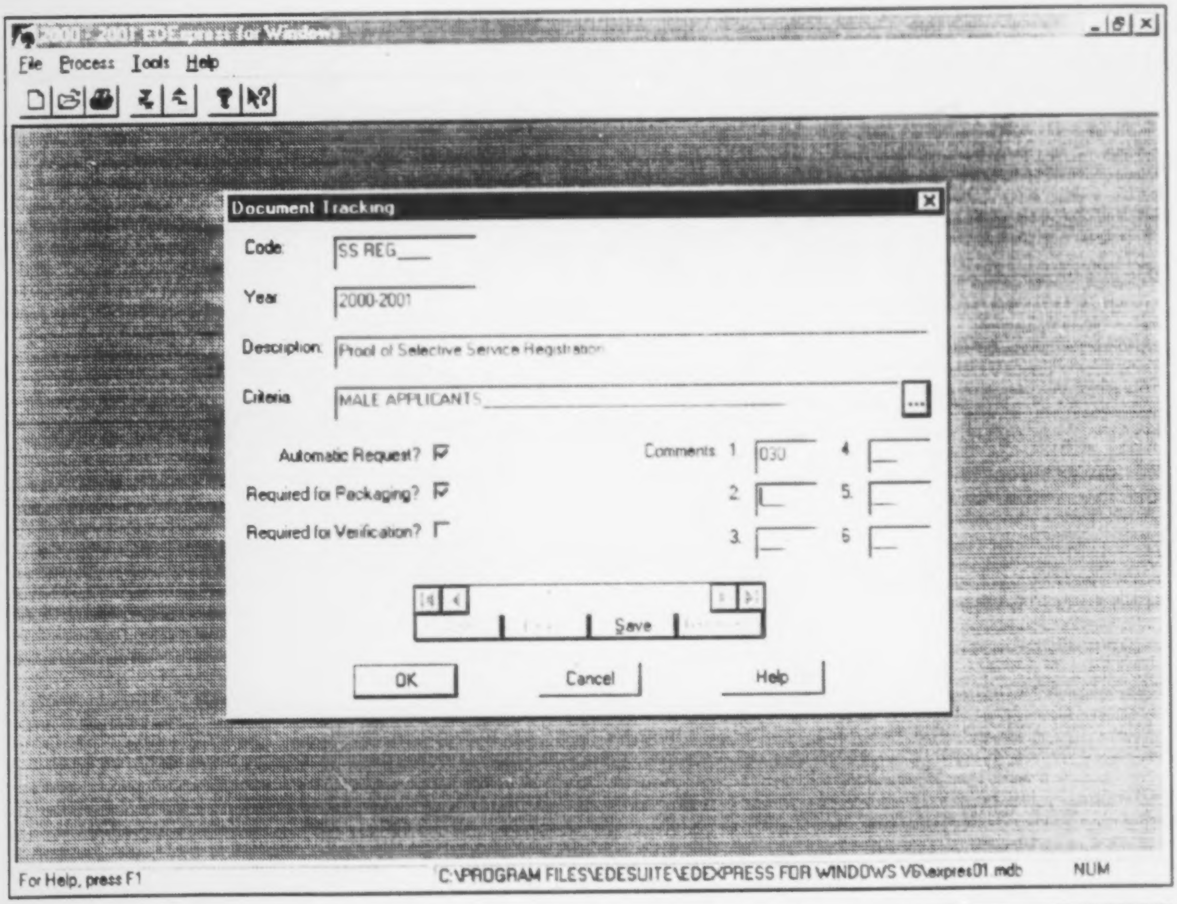
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

If you want to track this document based on ISIR comment codes, enter up to 6 codes under ***Comments***

The document is assigned to the student if any one of the comment codes appears on the student's ISIR record

Remember: *If you select the Automatic Request? option without specifying criteria, the document will be assigned to all packaging records during the Add Documents batch process*

You must check Automatic Request? if you enter any comment codes


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Document Tracking
Save
OK
Cancel
Help
For Help, press F1
NUM

Code: SS REG

Year: 2000-2001

Description: Proof of Selective Service Registration

Criteria: MALE APPLICANTS

Automatic Request? ☑

Required for Packaging? ☑

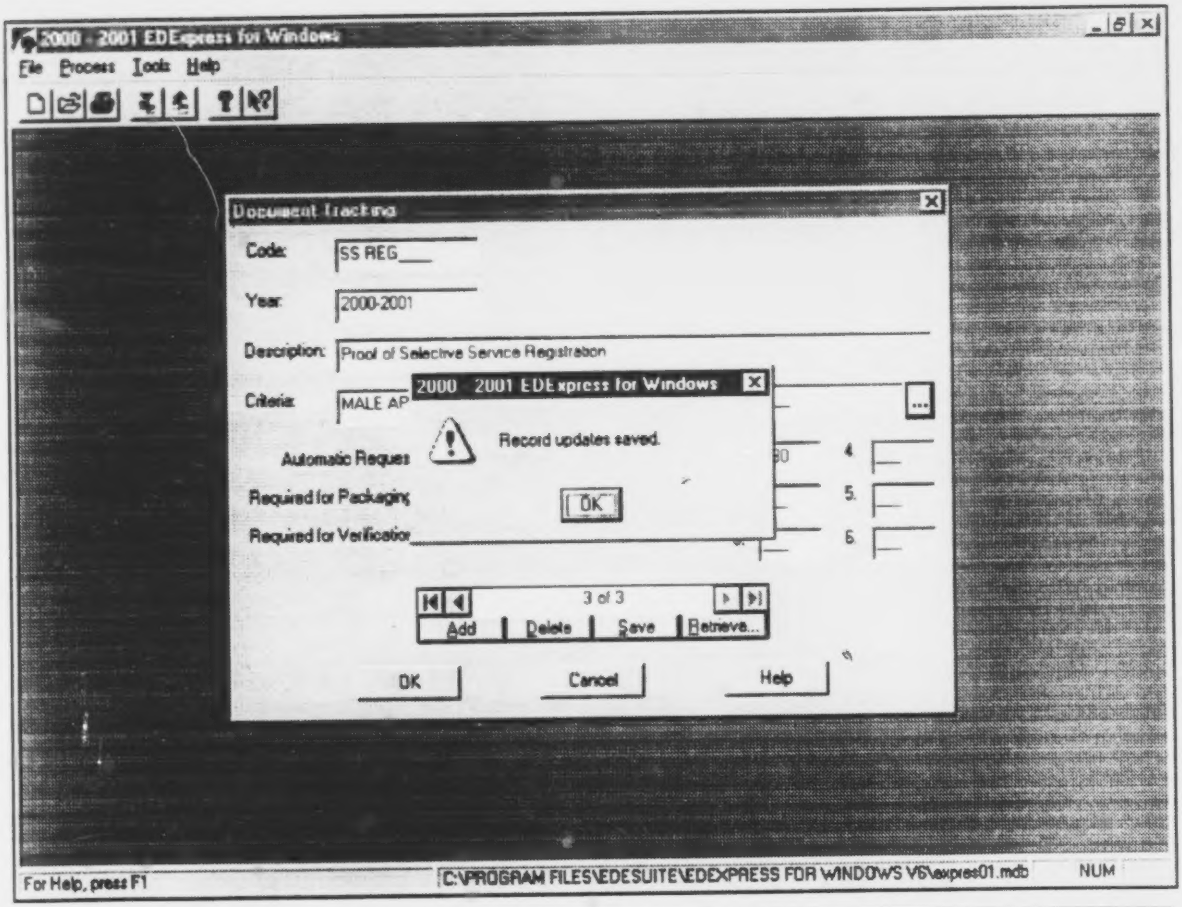
Required for Verification? ☐

Comments 1. 030

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

Click ***Save*** *to save the record*

Click ***OK*** *to continue*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Document Tracking
Automatic Reques
Required for Packaging
Required for Verification
4.
5.
6.
3 of 3
Add
Delete
Save
Retrieve...
OK
Cancel
Help
2000 - 2001 EDExpress for Windows
OK
For Help, press F1
NUM

Code: SS REG

Year: 2000-2001

Description: Proof of Selective Service Registration

Criteria: MALE AP

Record updates saved.

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

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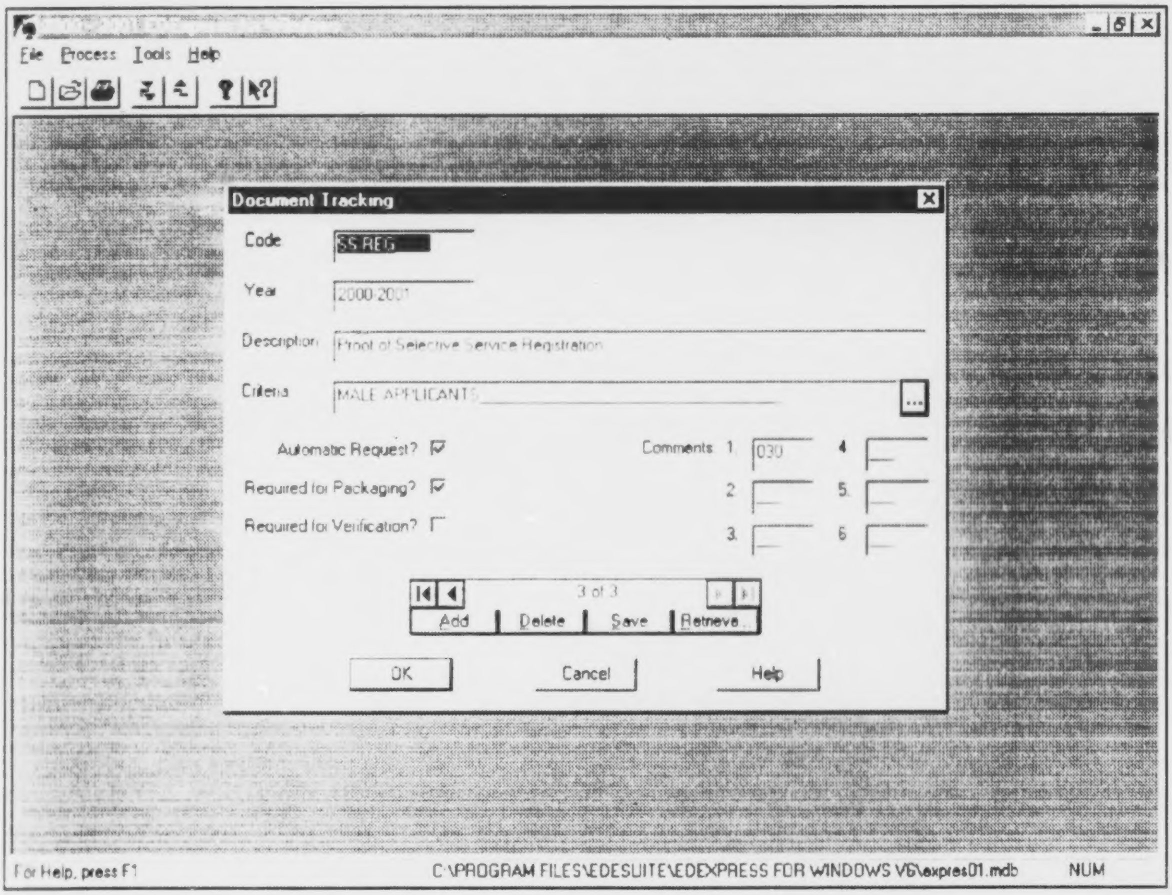
*Then, either click **Add** to create more documents or **OK** to exit this setup*

This example demonstrates a document (SS REG) that selects male students (using a query) who have an ISIR comment code of 030 (using the Comments option) to request that they provide proof of Selective Service registration. When the Add Documents process is run, the selected students will be assigned this document.


File
Process
Tools
Help
Document Tracking
3 of 3
Add
Delete
Save
Retrieve...
OK
Cancel
Help

Code: SS REG
Year: 2000-2001
Description: Proof of Selective Service Registration
Criteria: MALE APPLICANTS
Automatic Request? ☑
Required for Packaging? ☑
Required for Verification? ☐
Comments 1: 030

For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

Apply What You Learned

Before moving on to the next lesson, let's work on completing Document Tracking Worksheets for documents you want to use in your packaging process (You'll actually set up the documents in the software in Unit 4.)

Think of all documents you need to track for students (dependent and independent) who are selected for verification At a minimum, the student's tax return, the parent's tax return, and the Verification Worksheet are needed

Consider the following

- In addition to the documents identified above, are others needed?
- What requirement options are you going to assign the documents?
    - Automatic Request
    - Required for Packaging
    - Required for Verification
- Should you assign ISIR comment codes?
- Do you need to create queries in the App Express module to assign the documents to the appropriate student populations?
- Is there an existing query in the App Express database that you can modify or use to create a new query, if needed?
- Would any new queries you must create require you also to create user-defined fields in the Global database?

1 Complete a Document Tracking Worksheet for each document required of all students selected for verification Blank worksheets are provided immediately following this page

2 If necessary, complete corresponding query worksheets to identify the student populations associated with the documents you defined (a blank Query Worksheet follows the Document Tracking Worksheets) Refer to page A-5 for a listing of available data fields in the App Express database

Note: *A user-defined query, Selected for Verification-Dependent, already has been created in the software for you*

Remember: *Although user-defined fields are created in the Global database, they are accessible to all EDExpress modules for various functions, including queries*

Document Tracking Worksheet

1. **Document Code:** This code displays on reports and on the Document Tracking tab of the student's record (10-character alphanumeric).

Document Code:	

2. **Year:** Enter the year(s), if applicable, that applies to the document begin requested. This prints on reports and on the Document Tracking tab of the student's record (9-character alphanumeric).

Year:	

3. **Description:** Enter a free-form description of the document. The description prints on the Document Tracking letter as the item being requested (50-character alphanumeric).

Description:	

4. **Criteria:** Enter title of query that selects student records that the document tracking code is assigned.

Criteria:	

5. **Automatic Request?** Do you want this document to be added automatically to student records when the Add Documents function is performed?

Automatic Request?	Yes ☐ No ☐

6. **Required for Packaging?** Is this document required before your office packages financial aid for students to which the document is assigned?

Required for Packaging?	Yes ☐ No ☐

7. **Required for Verification?** Is this document being requested of all students who have been selected for verification by CPS?

Required for Verification?	Yes ☐ No ☐

8. **Comments:** This document should be assigned to those student records having one or more of the following ISIR comment codes:

☐ ☐ ☐ ☐ ☐ ☐

Document Tracking Worksheet

1. **Document Code:** This code displays on reports and on the Document Tracking tab of the student's record (10-character alphanumeric).

Document Code:

2. **Year:** Enter the year(s), if applicable, that applies to the document begin requested. This prints on reports and on the Document Tracking tab of the student's record (9-character alphanumeric).

Year:

3. **Description:** Enter a free-form description of the document. The description prints on the Document Tracking letter as the item being requested (50-character alphanumeric).

Description:

4. **Criteria:** Enter title of query that selects student records that the document tracking code is assigned.

Criteria:

5. **Automatic Request?** Do you want this document to be added automatically to student records when the Add Documents function is performed?

Automatic Request? Yes ☐ No ☐

6. **Required for Packaging?** Is this document required before your office packages financial aid for students to which the document is assigned?

Required for Packaging? Yes ☐ No ☐

7. **Required for Verification?** Is this document being requested of all students who have been selected for verification by CPS?

Required for Verification? Yes ☐ No ☐

8. **Comments:** This document should be assigned to those student records having one or more of the following ISIR comment codes:

☐ ☐ ☐ ☐ ☐ ☐

Document Tracking Worksheet

1. **Document Code:** This code displays on reports and on the Document Tracking tab of the student's record (10-character alphanumeric).

Document Code:

2. **Year:** Enter the year(s), if applicable, that applies to the document begin requested. This prints on reports and on the Document Tracking tab of the student's record (9-character alphanumeric).

Year:

3. **Description:** Enter a free-form description of the document. The description prints on the Document Tracking letter as the item being requested (50-character alphanumeric).

Description:

4. **Criteria:** Enter title of query that selects student records that the document tracking code is assigned.

Criteria:

5. **Automatic Request?** Do you want this document to be added automatically to student records when the Add Documents function is performed?

Automatic Request? Yes ☐ No ☐

6. **Required for Packaging?** Is this document required before your office packages financial aid for students to which the document is assigned?

Required for Packaging? Yes ☐ No ☐

7. **Required for Verification?** Is this document being requested of all students who have been selected for verification by CPS?

Required for Verification? Yes ☐ No ☐

8. **Comments:** This document should be assigned to those student records having one or more of the following ISIR comment codes:

☐ ☐ ☐ ☐ ☐ ☐

Document Tracking Worksheet

1. **Document Code:** This code displays on reports and on the Document Tracking tab of the student's record (10-character alphanumeric).

Document Code:

2. **Year:** Enter the year(s), if applicable, that applies to the document begin requested. This prints on reports and on the Document Tracking tab of the student's record (9-character alphanumeric).

Year:

3. **Description:** Enter a free-form description of the document. The description prints on the Document Tracking letter as the item being requested (50-character alphanumeric).

Description:

4. **Criteria:** Enter title of query that selects student records that the document tracking code is assigned.

Criteria:

5. **Automatic Request?** Do you want this document to be added automatically to student records when the Add Documents function is performed?

Automatic Request? Yes ☐ No ☐

6. **Required for Packaging?** Is this document required before your office packages financial aid for students to which the document is assigned?

Required for Packaging? Yes ☐ No ☐

7. **Required for Verification?** Is this document being requested of all students who have been selected for verification by CPS?

Required for Verification? Yes ☐ No ☐

8. **Comments:** This document should be assigned to those student records having one or more of the following ISIR comment codes:

☐ ☐ ☐ ☐ ☐ ☐

Query Worksheet

What Task do You Want to Perform?	What Module is Available to Create the Query to Perform this Task?
	☐ Apps ☐ Global ☐ DL ☐ Packaging ☐ Pell

Enter a title for the Query that describes the group of students to be selected:

Data Element	Operators	Value
Enter the data field(s) from the Module indicated above	=, <>, <, >, >=, <=, like, not like	☐ Prompt at Execution (to create a parameter query) ☐ Enter free-form or system-assigned value
	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	

User-Defined Text

According to settings you define in Global module, you can create and print three categories of letters in EDExpress

- Award letters
- Document tracking letters
- User letters

Award letters and document tracking letters include predefined texts, fixed formats, and optional print features You can make minimal changes to predefined texts but none to fixed formats (e g , line spacing, margins) When you generate a document tracking or award letter and print either to the printer or to a file, the student's record is updated to show that the letter was printed

For both award and document tracking letters, you can create additional text The user-defined text you create for award letters prints as a cover page to award letters For document tracking letters, the additional text prints as introductory text You also have the ability to define up to five general purpose or user letters

Additional features of the various letter types include

- A two-line heading identifying the letter type (award or document tracking) or name (user-defined) and the award year prints centered on the top of each page
- The date and the student's name and address appear on the upper left side
- Your institution's name and address, as well as the student ID, appear on the upper right side
- The salutation "Dear Student" appears flush to the left margin
- A signature appears on the bottom left side
- For all letter types, you can use selection criteria (i e , a query) to specify which students should receive the letters

Refer to Appendix D to see samples of each letter type

Award Letters

EDExpress offers three predefined award letters

- Offer letter
- Notification letter
- Missing Documents letter

The Offer and Notification letters report to the student the amount(s) and type(s) of aid awarded These letters also provide a place for the student to indicate that each award listed is accepted or declined If you choose the option, both types print the student's need analysis above the list of awards

Although both include an optional signature section, the wording for each differs The Notification letter advises that action is required of the student only if any of the awards are declined On the other hand, the Offer letter requires that the student sign a copy of the letter and return it to the school by a specified date In addition, EDExpress allows you to track the receipt of the student's acceptance of an Offer letter

Along with either award letter type, you can create and generate up to 40 lines of additional user-defined text User-defined text does not overwrite predefined text and, as noted above, prints as a cover page to the award letter In addition, you can choose to generate a separate Missing Documents letter

In the Packaging System Setup, you set the system default for the type of award letter you want the system to batch generate and print—Notification or Offer It's important to note that, at the student packaging record level, the system only generates and prints the Offer letter, even if you set the Packaging System default to Notification

[Slide 2-14]

Document Tracking Letters

The Document Tracking letter requests that the student submit documents needed to satisfy institutional requirements and to complete the financial aid process For example, you might request documents that are needed to package a student's financial aid, while others might be needed to disburse aid previously awarded

You can modify the predefined text, you can restore the original default text at any time, and you can include up to 12 lines of additional user-defined text

User Letters

You can use User letters to create general purpose letters For example, you might create a User letter to notify first-time student borrowers of loan entrance counseling sessions Or you might send an advisement to students not making Satisfactory Academic Progress

EDExpress allows you to create up to five User letters, and each may include up to 42 lines of text When you create User letters, you have the option to specify a letter name or title This title displays when you print User letters

[Slide 2-15]

Creating Award Letter Text

For each type of predefined award letter, Offer and Notification, you can create additional text that generates and prints as a cover page. Use this text to include messages specific to your institutional practices.

The following example demonstrates how to create additional text for an Offer letter. The same steps are followed for creating additional text for Notification and Missing Documents letters.

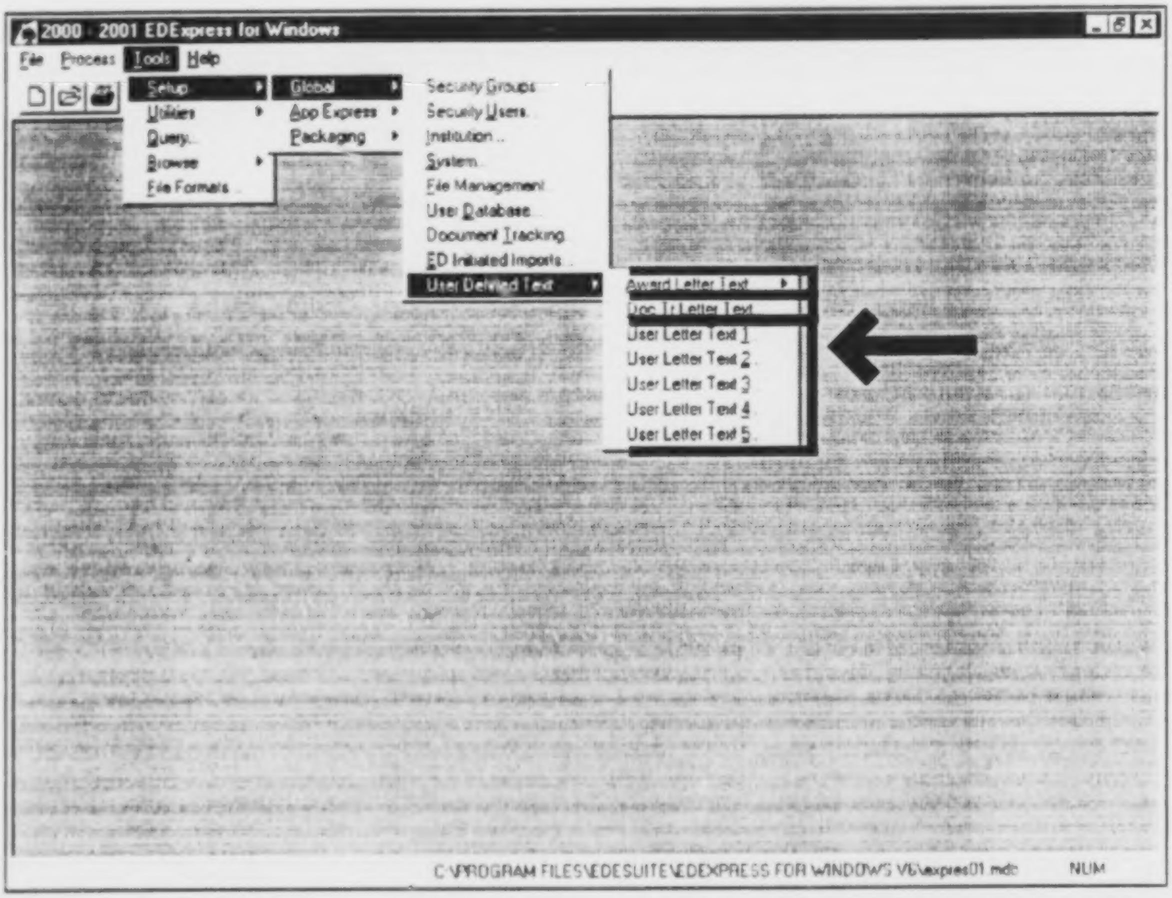
Remember: *The Missing Documents letter generates and prints as a supplemental page to the Offer and Notification letters, while the additional text prints as a cover page.*

To create text for your Offer letters

*Select **Tools/Setup/Global/User-Defined Text** on the menu bar*

Three categories of letters display

Award
Document Tracking
User


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Setup
Utilities
Query...
Browse
File Formats...
Global
App Express
Packaging
Security Groups...
Security Users...
Institution...
System...
File Management
User Database...
Document Tracking
ED Initiated Imports...
User Defined Text
Award Letter Text
Doc Tr Letter Text...
User Letter Text 1...
User Letter Text 2...
User Letter Text 3...
User Letter Text 4...
User Letter Text 5...
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

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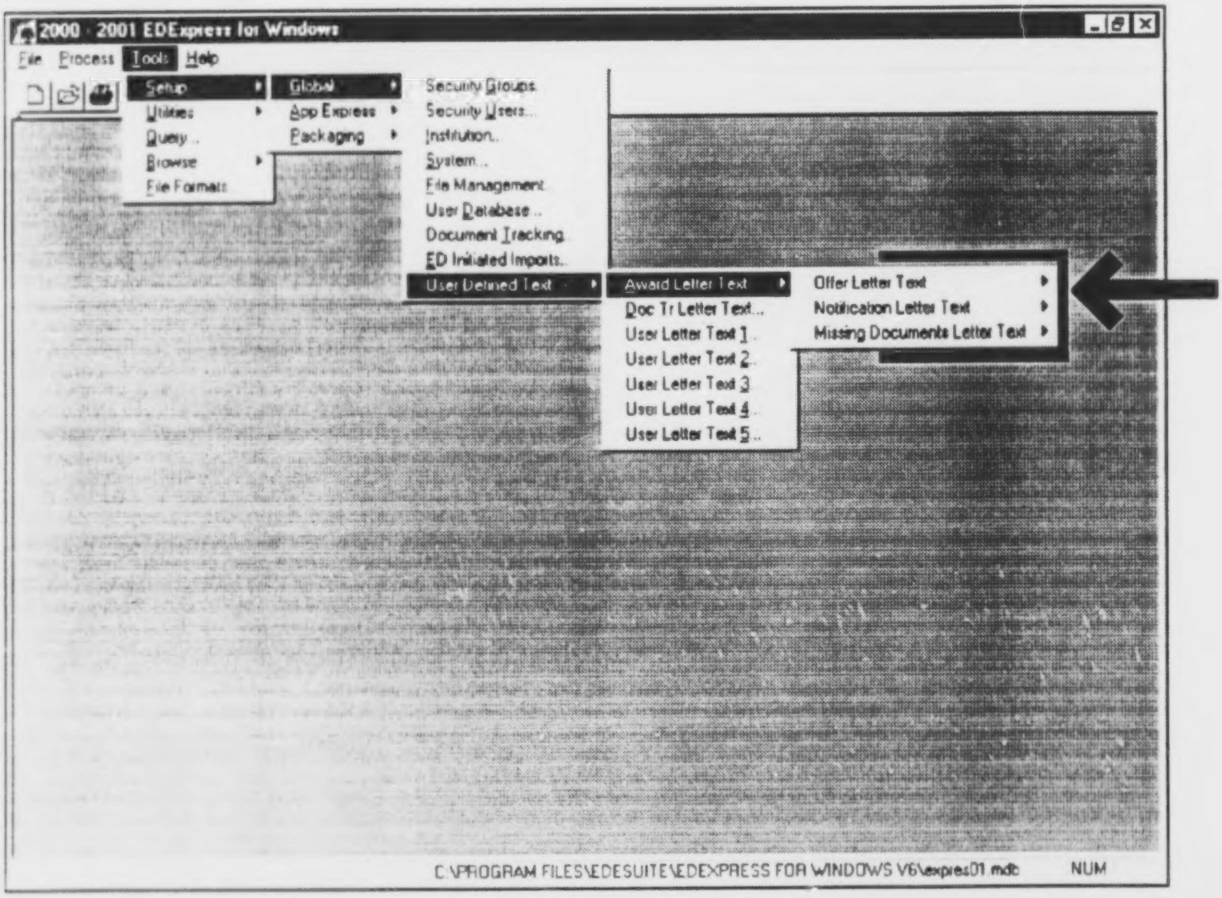
Select ***Award Letter Text***

Three types of award letter display

- *Offer*
- *Notification*
- *Missing Documents*

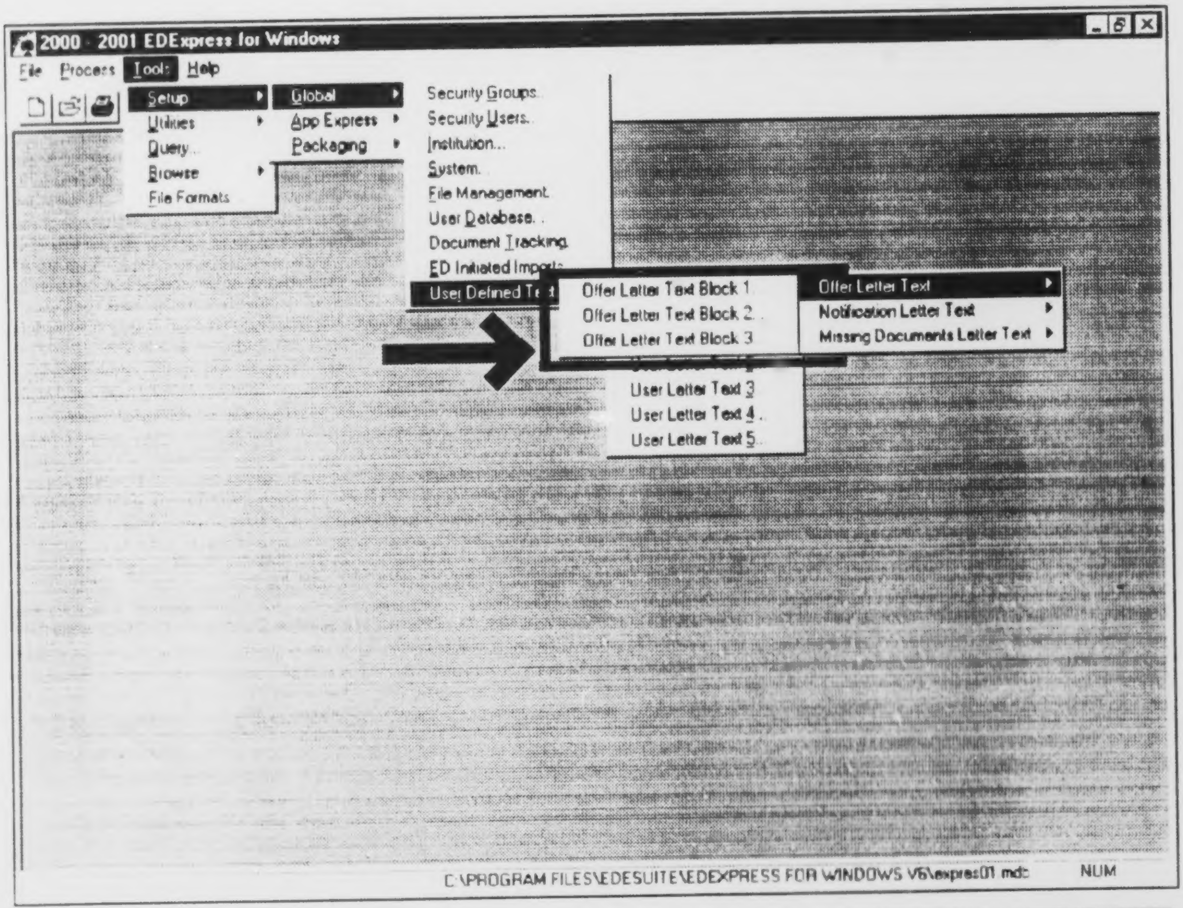

2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Setup
Utilities
Query...
Browse
File Formats
Global
App Express
Packaging
Security Groups...
Security Users...
Institution...
System...
File Management...
User Database...
Document Tracking...
ED Initiated Imports...
User Defined Text
Award Letter Text
Doc Tr Letter Text...
User Letter Text 1...
User Letter Text 2...
User Letter Text 3...
User Letter Text 4...
User Letter Text 5...
Offer Letter Text
Notification Letter Text
Missing Documents Letter Text
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

Offer Letter Text Blocks 2 and 3 include predefined text

*Select **Offer Letter***

Three text box options display

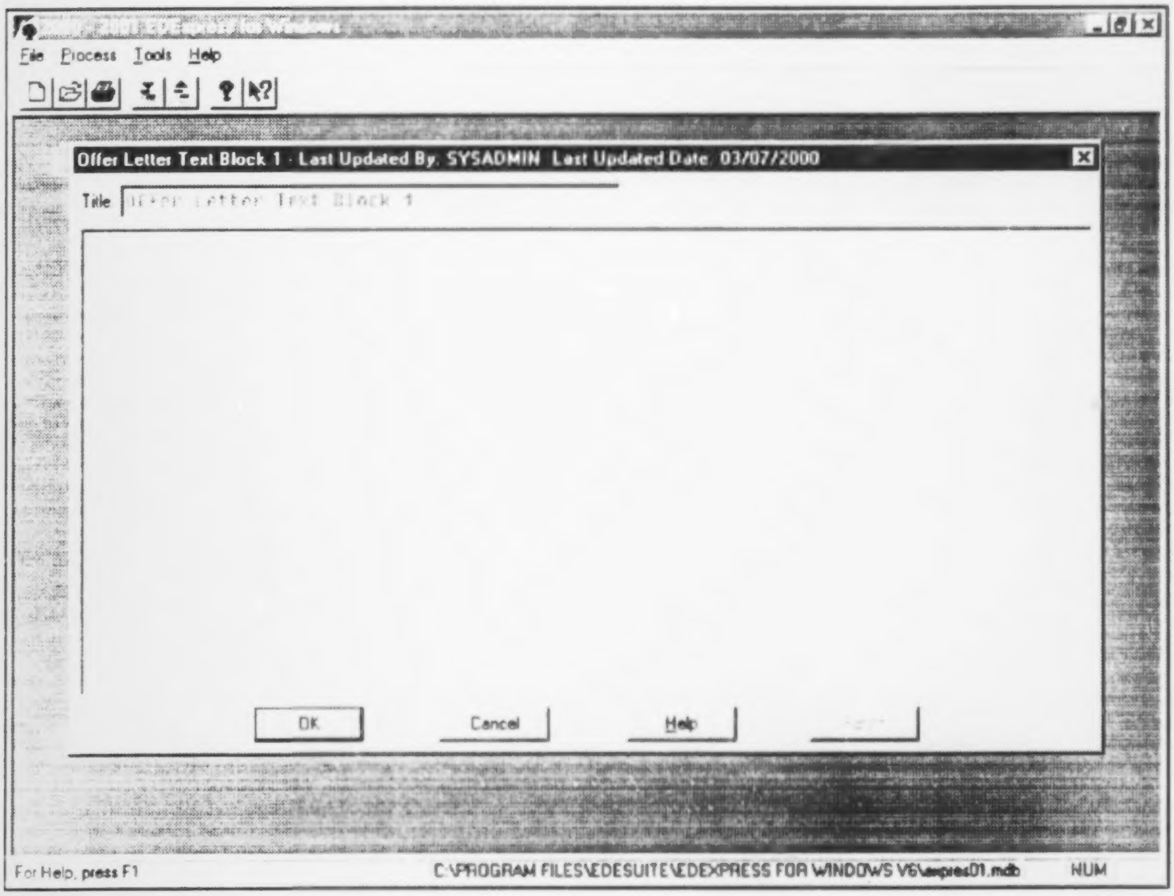
Text Block 1
Text Block 2
Text Block 3


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Setup
Utilities
Query...
Browse
File Formats
Global
App Express
Packaging
Security Groups...
Security Users...
Institution...
System...
File Management...
User Database...
Document Tracking...
ED Initiated Imports...
User Defined Text
Offer Letter Text Block 1...
Offer Letter Text Block 2...
Offer Letter Text Block 3...
Offer Letter Text
Notification Letter Text
Missing Documents Letter Text
User Letter Text 3...
User Letter Text 4...
User Letter Text 5...
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\express01.mdb
NUM

*Select **Offer Letter Text Block 1***

The Offer Letter Text Block 1 dialog box displays

In Text Block 1, additional user-defined text is created


2001 EDExpress for Windows
File
Process
Tools
Help
OK
Cancel
Help
NUM

Offer Letter Text Block 1 - Last Updated By: SYSADMIN Last Updated Date: 03/07/2000

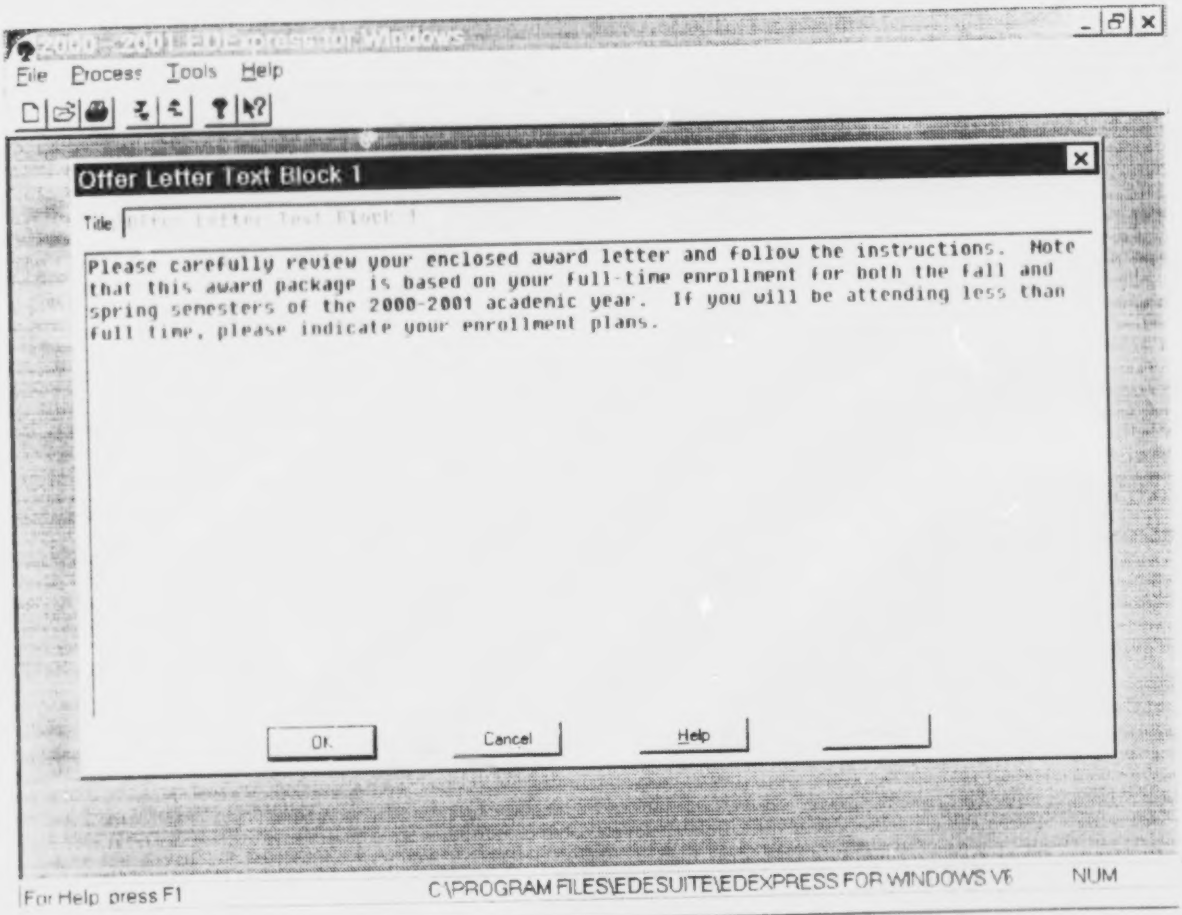
Title: Offer Letter Text Block 1

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

The text you create prints as a cover page to the Offer letter

Enter up to 42 lines of free-form text


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Offer Letter Text Block 1
OK
Cancel
Help

Title: Offer Letter Text Block 1

```
Please carefully review your enclosed award letter and follow the instructions.  Note
that this award package is based on your full-time enrollment for both the fall and
spring semesters of the 2000-2001 academic year.  If you will be attending less than
full time, please indicate your enrollment plans.
```

For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

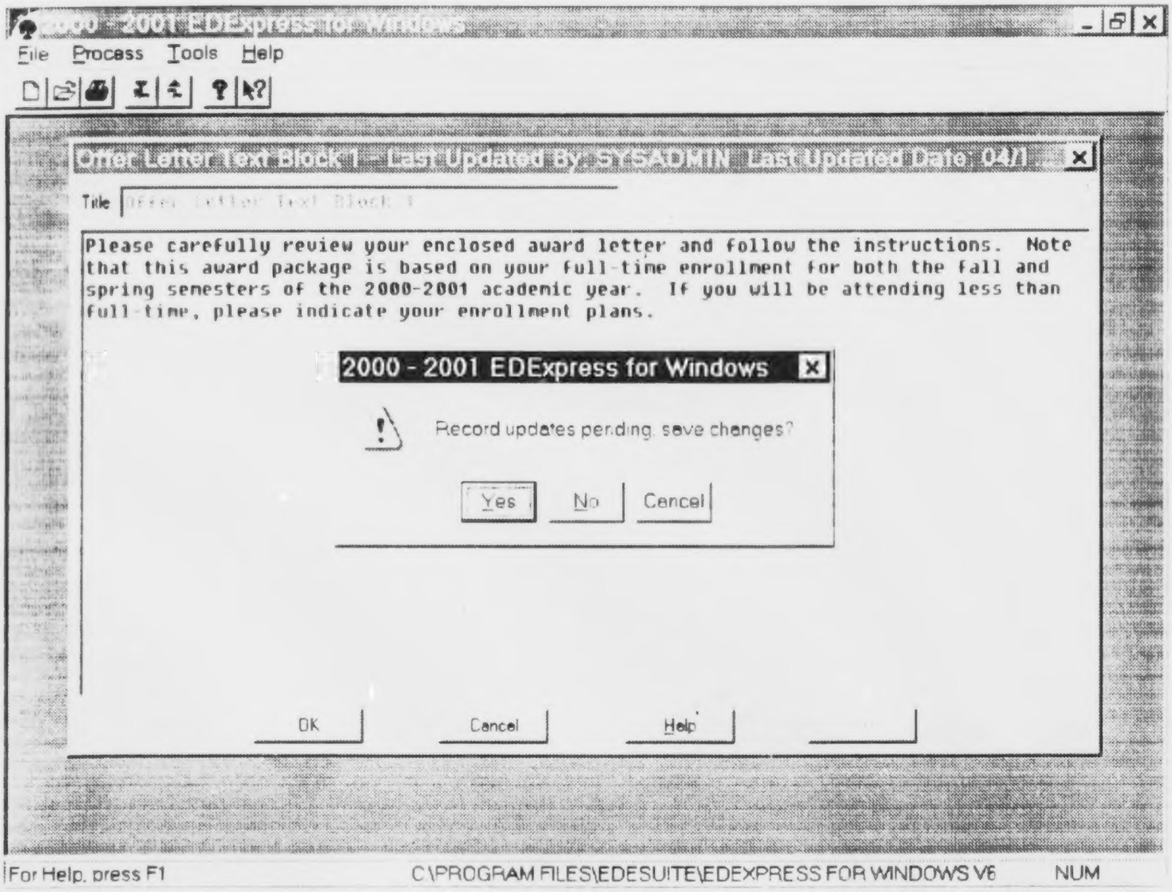
To save the text, click ***OK***

A Record Updates Pending, Save Changes dialog box displays

Click ***Yes***

Predefined Award Letter text can be modified. You also can opt to reset modified text to the original value.

Tip: If you want to modify the predefined text in Text Block 2 and Text Block 3, follow the previous process and select the text to be modified.


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Offer Letter Text Block 1 - Last Updated By: SYSADMIN Last Updated Date: 04/1
Title
2000 - 2001 EDExpress for Windows
Yes
No
Cancel
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

Title: Offer Letter Text Block 1

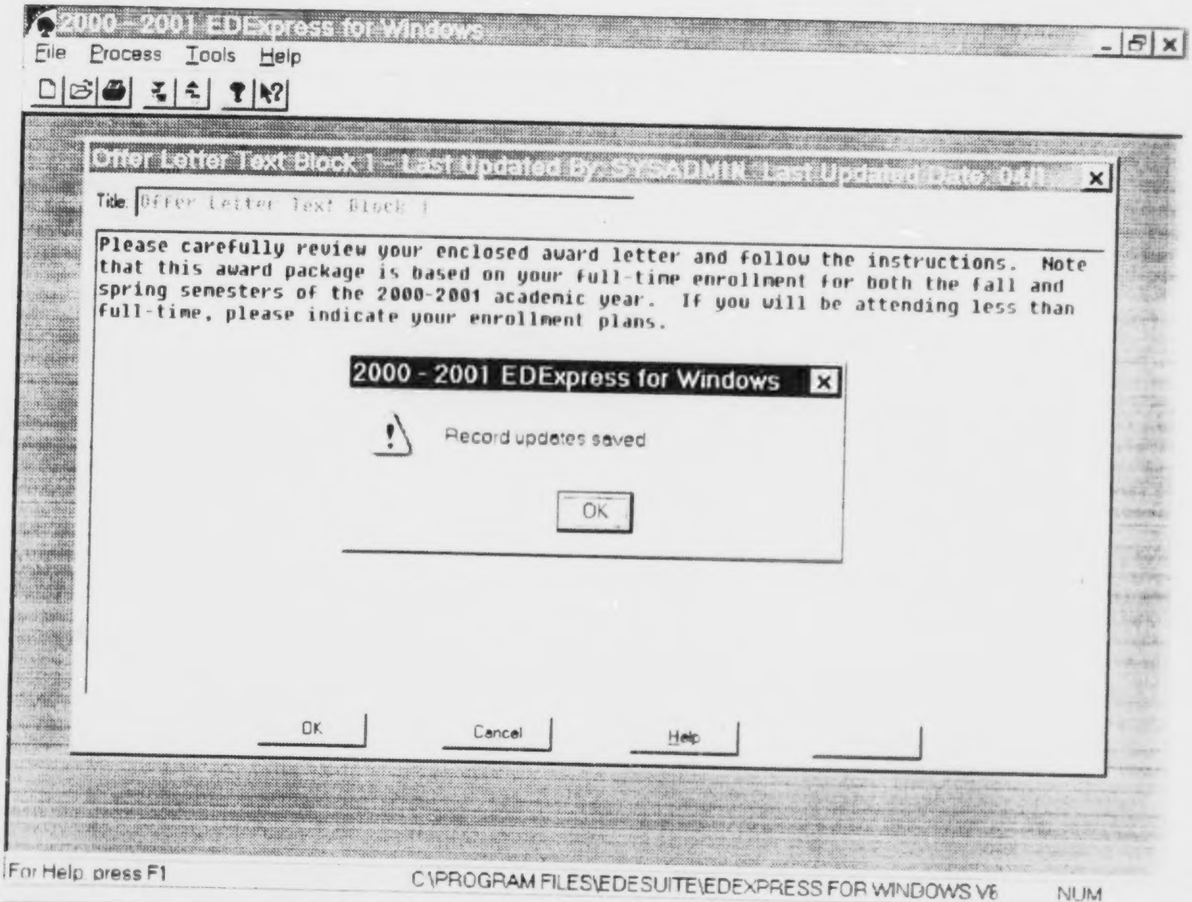
Please carefully review your enclosed award letter and follow the instructions. Note that this award package is based on your full-time enrollment for both the fall and spring semesters of the 2000-2001 academic year. If you will be attending less than full-time, please indicate your enrollment plans.

Record updates pending, save changes?

A Record Updates Saved dialog box displays

Click **OK**

The dialog box closes and you are returned to the main menu



2000 - 2001 EDExpress for Windows
File Process Tools Help
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

Offer Letter Text Block 1 - Last Updated By: SYSADMIN Last Updated Date: 04/1

Title: Offer Letter Text Block 1

Please carefully review your enclosed award letter and follow the instructions. Note that this award package is based on your full-time enrollment for both the fall and spring semesters of the 2000-2001 academic year. If you will be attending less than full-time, please indicate your enrollment plans.

2000 - 2001 EDExpress for Windows

Record updates saved

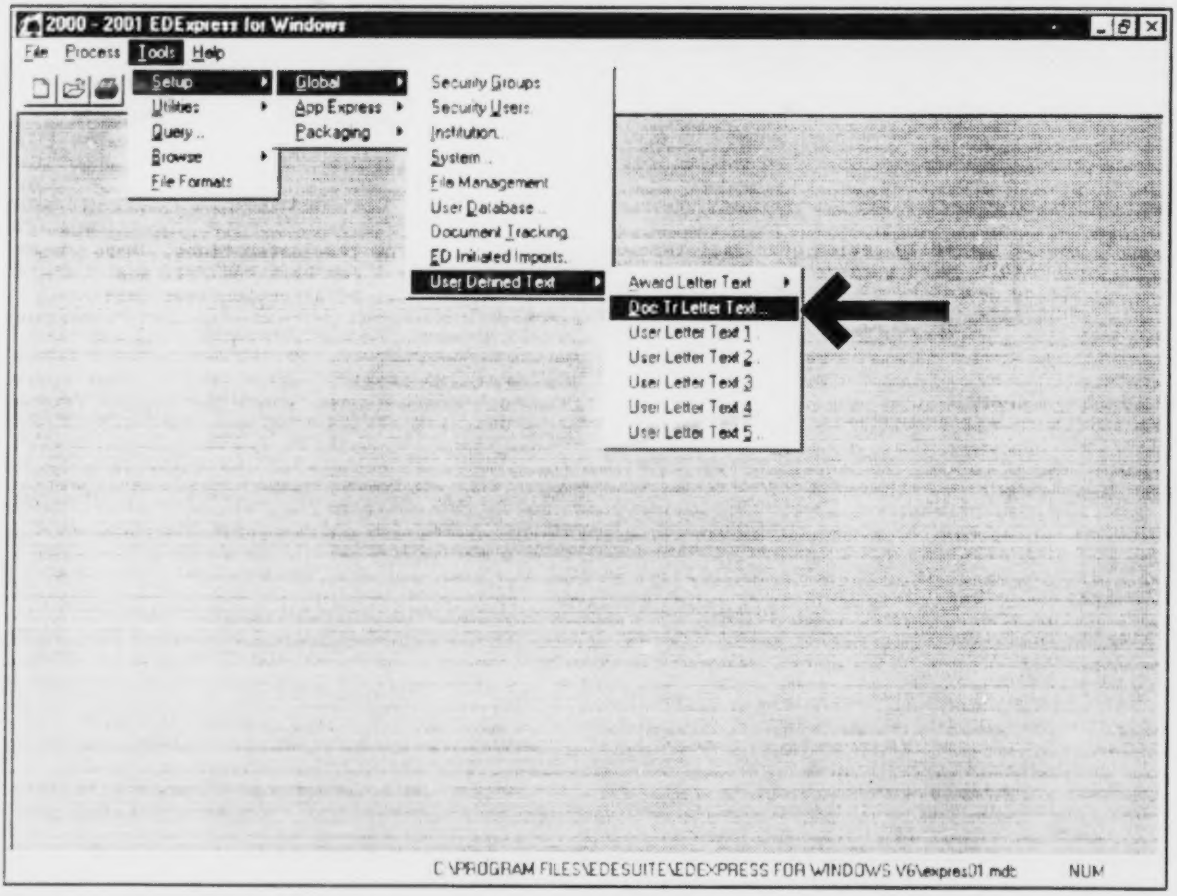
OK

Creating Document Tracking Letter Text

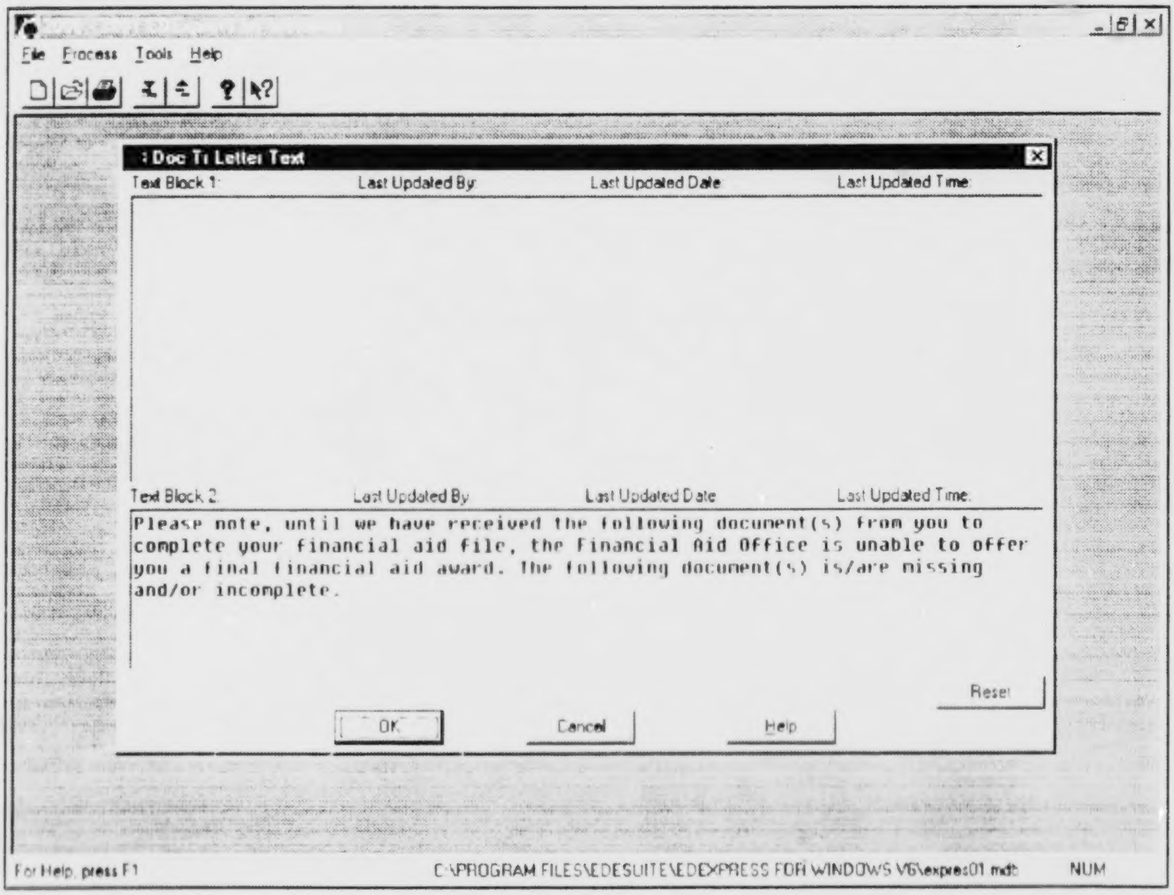
To create additional text for your Document Tracking letters

Select ***Tools/Setup/ Global/User-Defined Text/Doc Tr Letter Text***

You can create up to 12 lines of additional text for Document Tracking letters. You also can modify the predefined text.


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Setup
Utilities
Query...
Browse
File Formats
Global
App Express
Packaging
Security Groups
Security Users
Institution...
System...
File Management
User Database...
Document Tracking
ED Initiated Imports...
User Defined Text
Award Letter Text
Doc Tr Letter Text...
User Letter Text 1...
User Letter Text 2...
User Letter Text 3...
User Letter Text 4...
User Letter Text 5...
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

The Doc Tr Letter Text dialog box displays.


File Process Tools Help
Doc Tr Letter Text
Text Block 1:
Last Updated By:
Last Updated Date:
Last Updated Time:
Text Block 2:
Last Updated By:
Last Updated Date:
Last Updated Time:
Reset
OK
Cancel
Help
For Help, press F1
NUM

Please note, until we have received the following document(s) from you to complete your financial aid file, the Financial Aid Office is unable to offer you a final financial aid award. The following document(s) is/are missing and/or incomplete.

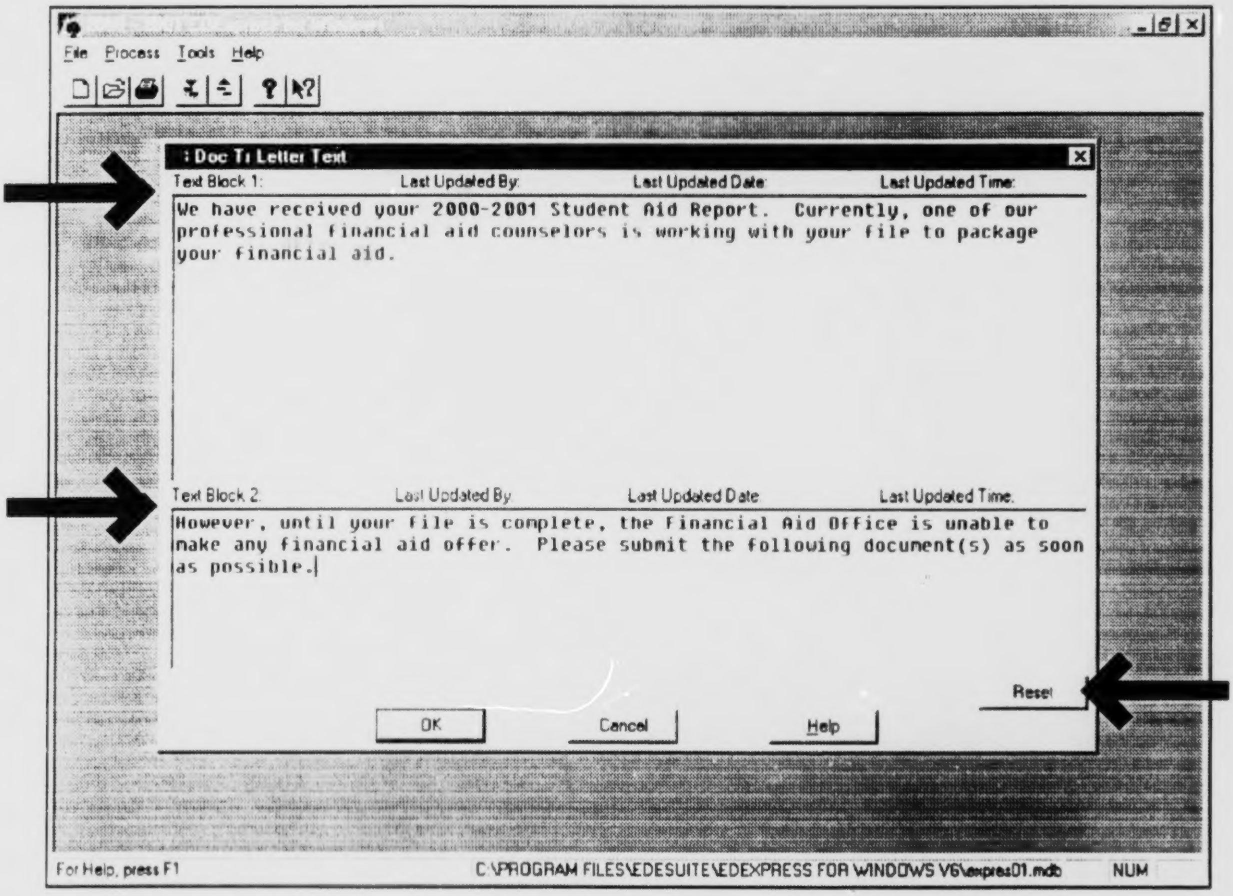
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

In Text Block 1, enter up to 12 lines of your own text

In Text Block 2, make any changes you want to the predefined text

The dialog box is divided into Text Block 1 and Text Block 2. In Text Block 1 you can enter up to 12 lines of additional text, while in Text Block 2 you have the option of modifying the predefined text.

You may restore predefined text you changed in Text Block 2 by selecting the Reset button.


File
Process
Tools
Help
Doc Tr Letter Text
Text Block 1:
Last Updated By:
Last Updated Date:
Last Updated Time:
Text Block 2:
Last Updated By:
Last Updated Date:
Last Updated Time:
Reset
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

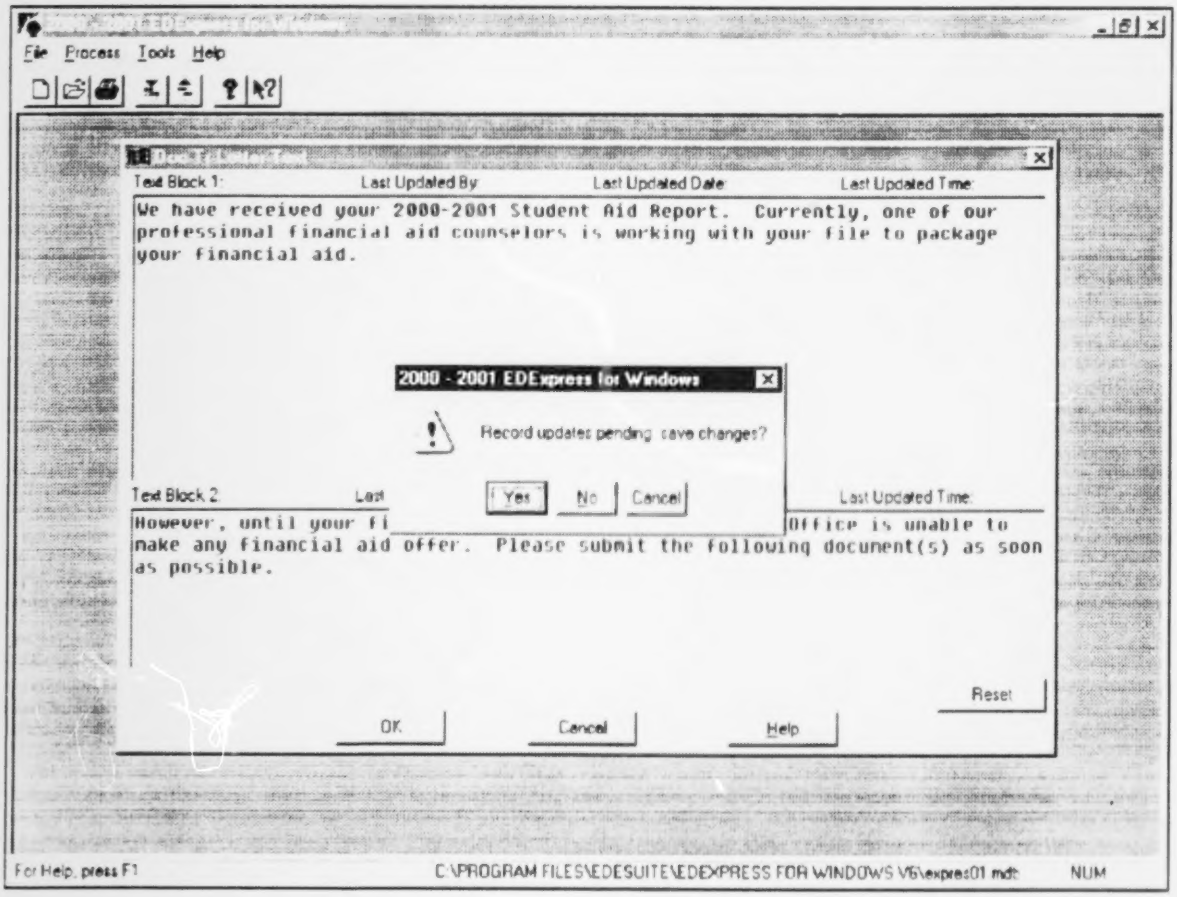
Text Block 1:

```
We have received your 2000-2001 Student Aid Report.  Currently, one of our
professional financial aid counselors is working with your file to package
your financial aid.
```

Text Block 2:

```
However, until your file is complete, the Financial Aid Office is unable to
make any financial aid offer.  Please submit the following document(s) as soon
as possible.
```

*To save both blocks of text, click **OK**, **Yes**, then **OK** again.*



File Process Tools Help
Text Block 1: Last Updated By: Last Updated Date: Last Updated Time:
2000 - 2001 EDExpress for Windows
Yes No Cancel
Text Block 2: Last Last Updated Time:
Reset
OK Cancel Help
For Help, press F1
NUM

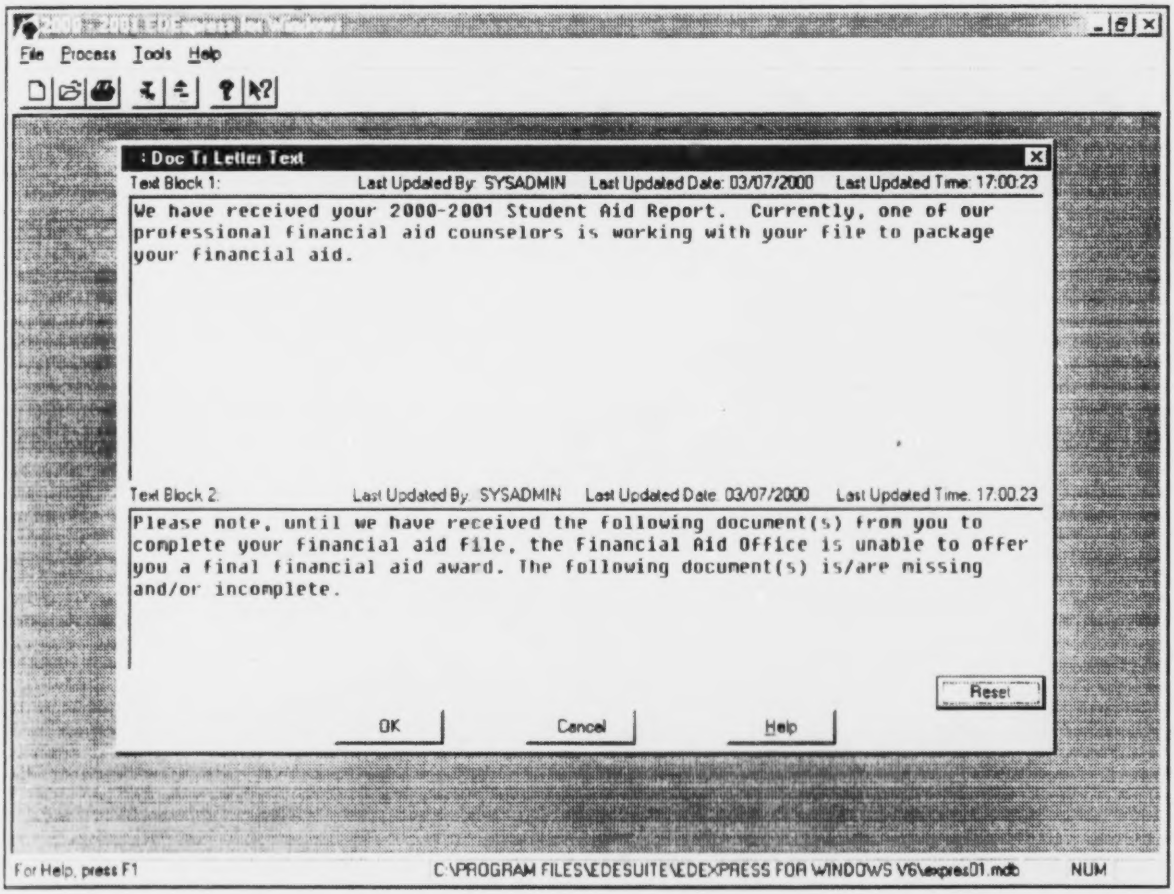
We have received your 2000-2001 Student Aid Report. Currently, one of our professional financial aid counselors is working with your file to package your financial aid.

Record updates pending, save changes?

However, until your fi Office is unable to make any financial aid offer. Please submit the following document(s) as soon as possible.

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

To restore the predefined text in Text Block 2, click ***Reset***


2000 - 2001 EDExpress for Windows
File Process Tools Help
: Doc Tr Letter Text
Reset
OK
Cancel
Help
For Help, press F1
NUM

Text Block 1: Last Updated By: SYSADMIN Last Updated Date: 03/07/2000 Last Updated Time: 17:00:23

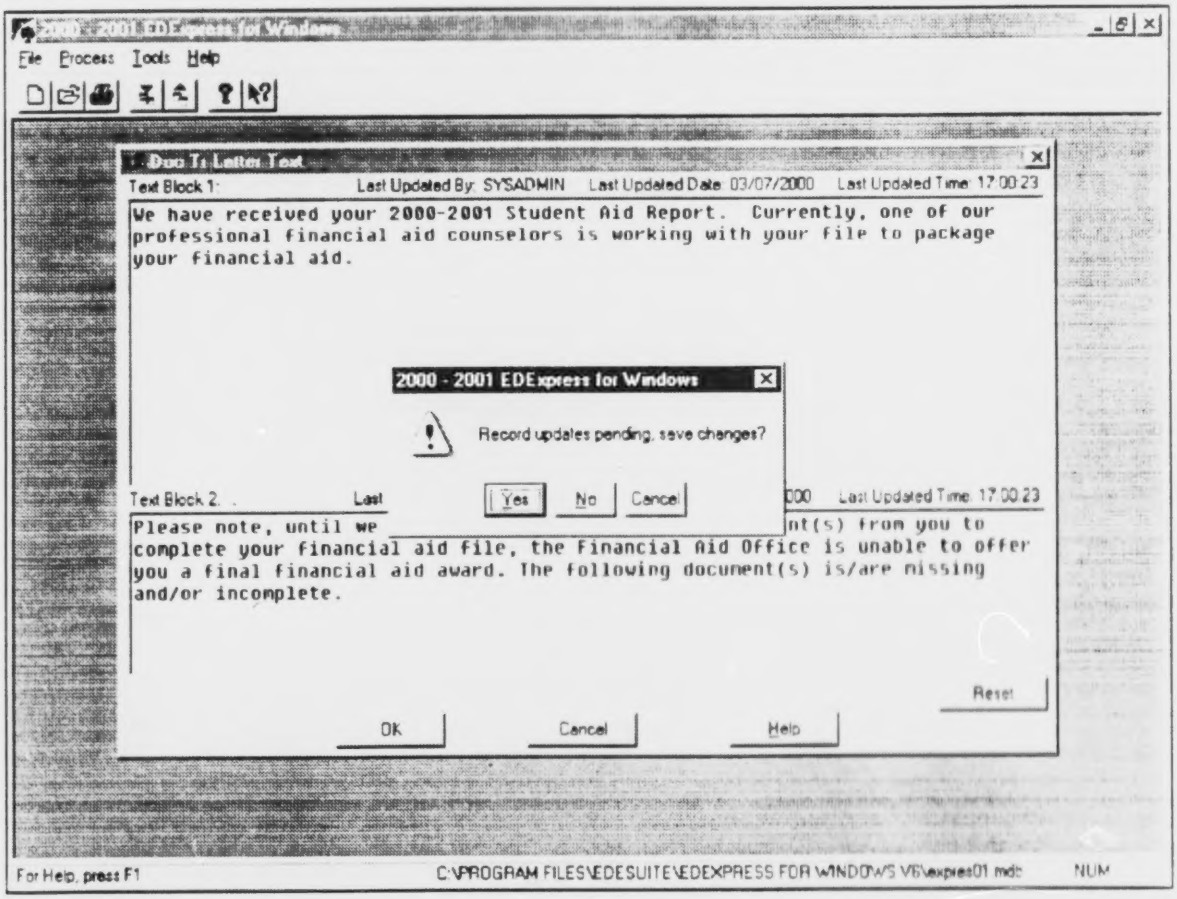
We have received your 2000-2001 Student Aid Report. Currently, one of our professional financial aid counselors is working with your file to package your financial aid.

Text Block 2: Last Updated By: SYSADMIN Last Updated Date: 03/07/2000 Last Updated Time: 17:00:23

Please note, until we have received the following document(s) from you to complete your financial aid file, the Financial Aid Office is unable to offer you a final financial aid award. The following document(s) is/are missing and/or incomplete.

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

To save the reset to Text Block 2, click ***OK*** ***Yes****, then* ***OK*** *again*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Doc 1: Letter Text
Reset
OK
Cancel
Help

Text Block 1: Last Updated By: SYSADMIN Last Updated Date: 03/07/2000 Last Updated Time: 17:00:23

```
We have received your 2000-2001 Student Aid Report.  Currently, one of our
professional financial aid counselors is working with your file to package
your financial aid.
```

2000 - 2001 EDExpress for Windows

Record updates pending, save changes?

Yes No Cancel

Text Block 2: Last 000 Last Updated Time: 17:00:23

```
Please note, until we                                nt(s) from you to
complete your financial aid file, the Financial Aid Office is unable to offer
you a final financial aid award. The following document(s) is/are missing
and/or incomplete.
```

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb NUM

Creating User Letter Text

To create a User Letter

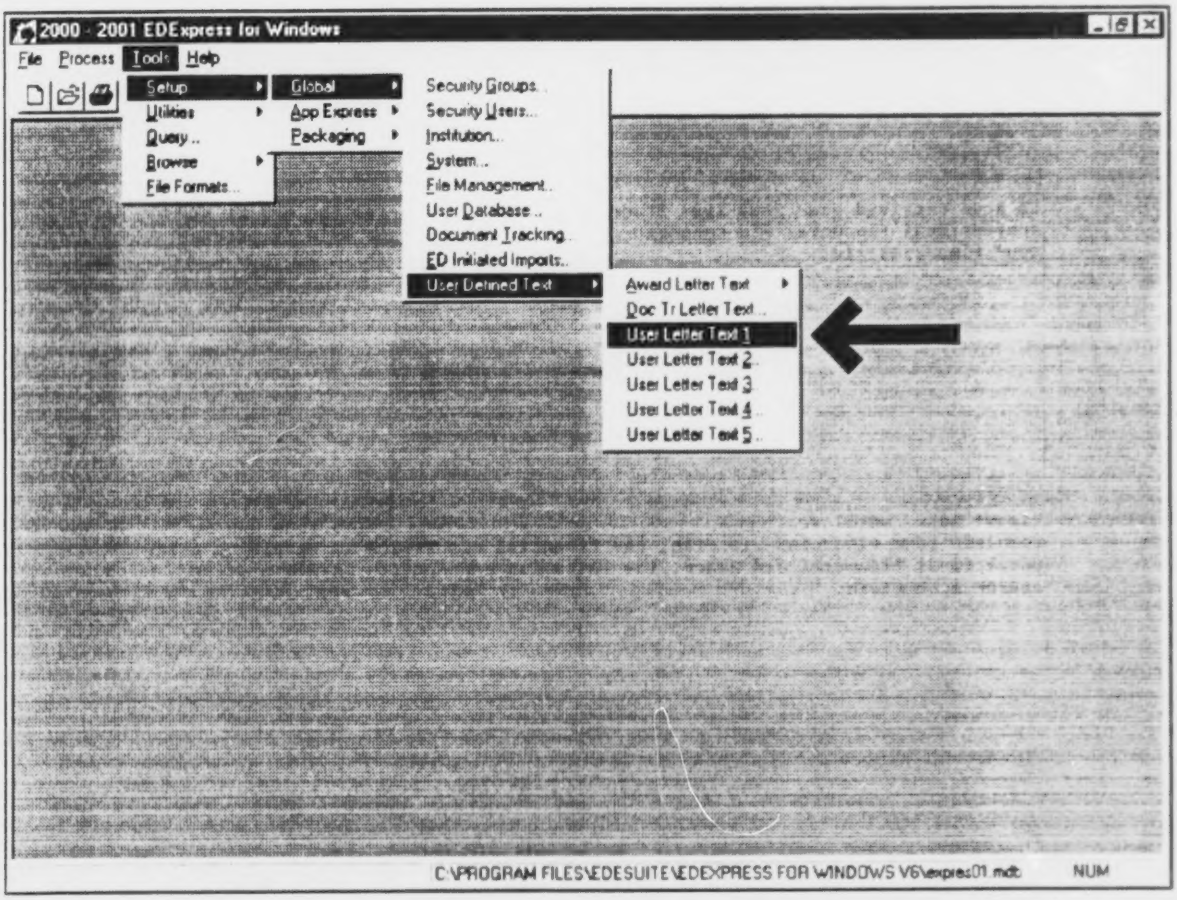
Select ***Tools/Setup/ Global/User-Defined Text/User Letter Text 1***

Five User Letter options display on the menu

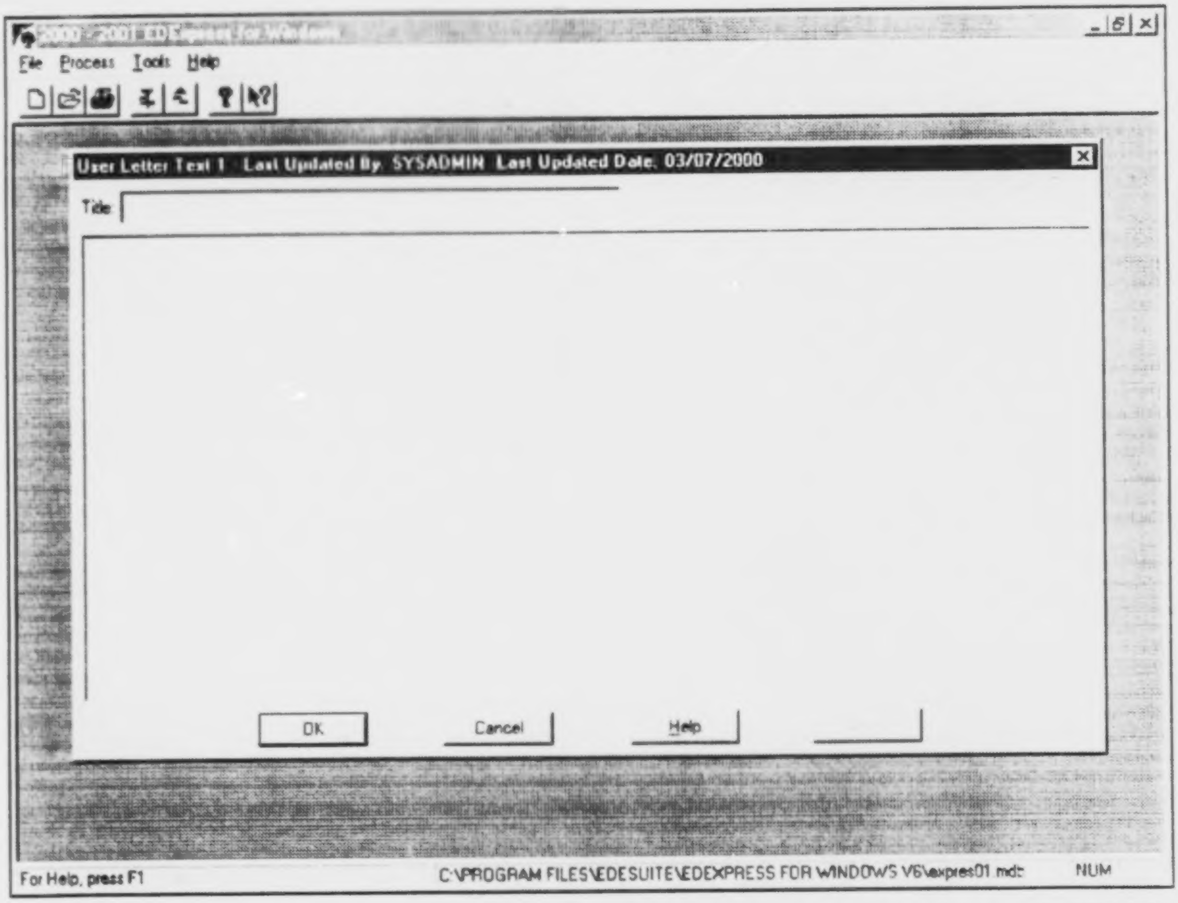
Select ***User Letter 1***

The EDExpress User Letters option allows you to define up to 5 standard or general purpose letters to send to students

In the example that follows, we'll work with User Letter 1


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Setup
Utilities
Query...
Browse
File Formats...
Global
App Express
Packaging
Security Groups...
Security Users...
Institution...
System...
File Management...
User Database...
Document Tracking...
ED Initiated Imports...
User Defined Text
Award Letter Text
Doc Tr Letter Text...
User Letter Text 1
User Letter Text 2...
User Letter Text 3...
User Letter Text 4...
User Letter Text 5...
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

The User Letter 1 Text dialog box displays

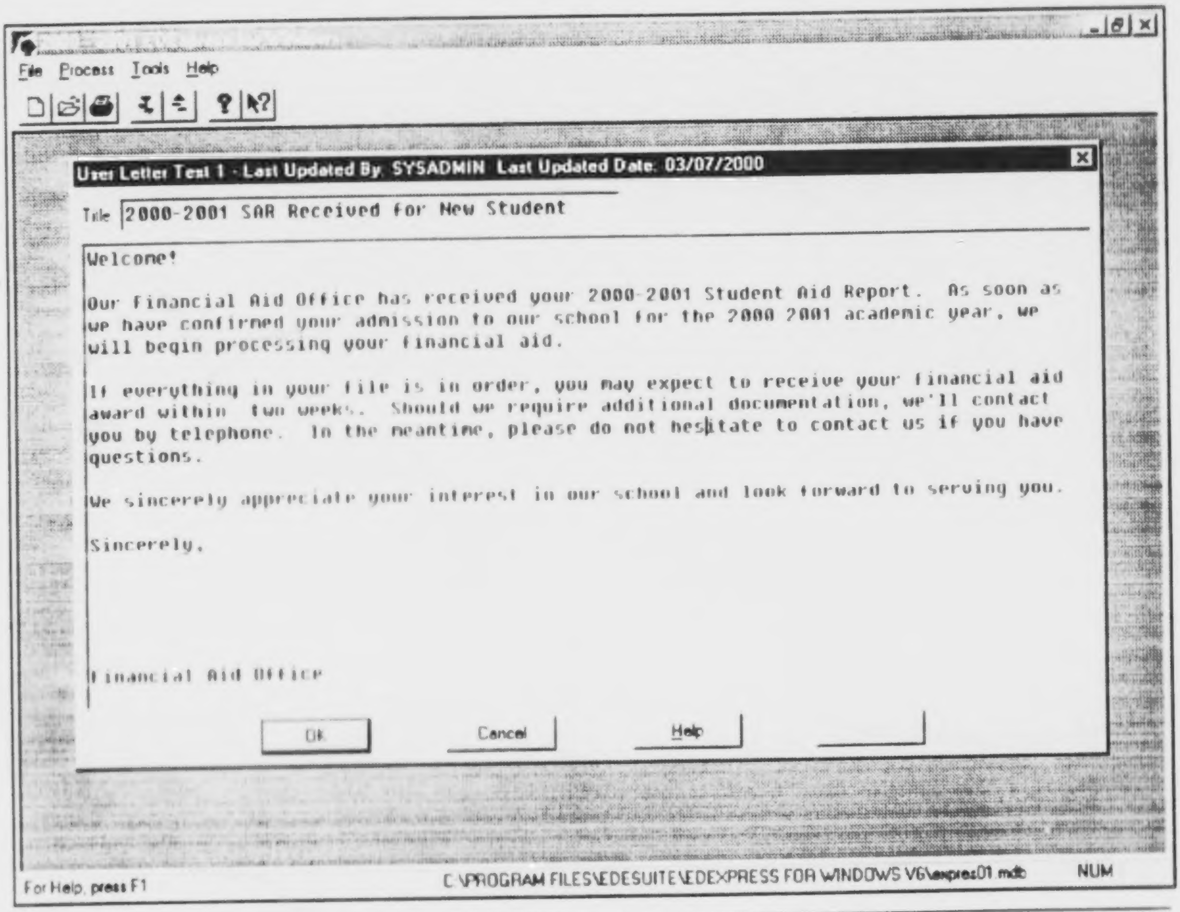

2000 - 2001 EDExpress for Windows
File Process Tools Help
User Letter Text 1 - Last Updated By: SYSADMIN Last Updated Date: 03/07/2000
Title
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

*Enter a **Title** for User Letter 1*

Then, enter up to 42 lines of text

When you print User Letter 1, the Print dialog box displays the title of the letter

Tip: Because a User Letter Text Block is a blank page, you must include a salutation and closing as part of your text if you want these options to appear on your User Letter


File
Process
Tools
Help
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

User Letter Text 1 - Last Updated By: SYSADMIN Last Updated Date: 03/07/2000

Title: 2000-2001 SAR Received for New Student

Welcome!

Our Financial Aid Office has received your 2000-2001 Student Aid Report. As soon as we have confirmed your admission to our school for the 2000-2001 academic year, we will begin processing your financial aid.

If everything in your file is in order, you may expect to receive your financial aid award within two weeks. Should we require additional documentation, we'll contact you by telephone. In the meantime, please do not hesitate to contact us if you have questions.

We sincerely appreciate your interest in our school and look forward to serving you.

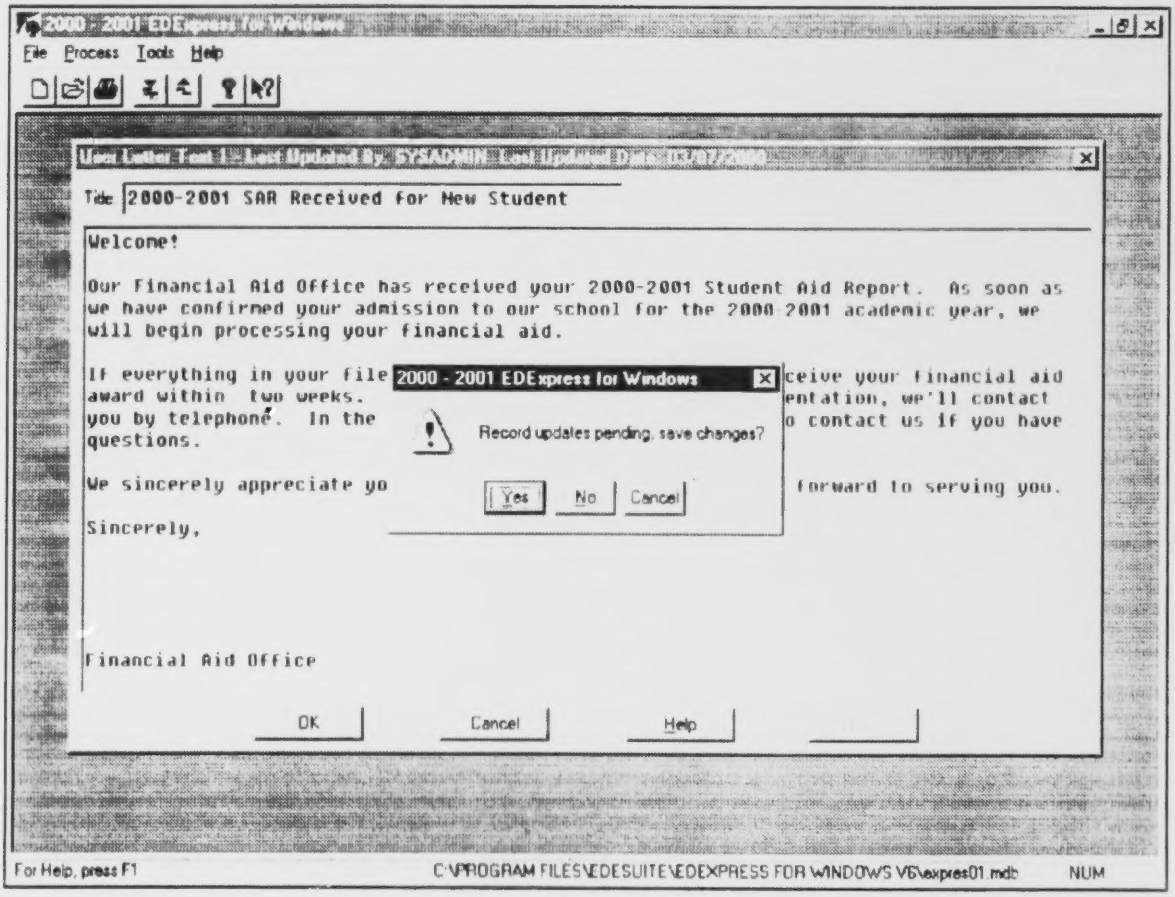
Sincerely,

Financial Aid Office

NEW!

User-defined letters can be printed from the Demo tab of open student records

To save the text, click ***OK***, ***Yes*** *then* ***OK*** *again*


2000 - 2001 EDExpress for Windows
File Process Tools Help
User Letter Text 1 - Last Updated By: SYSADMIN Last Updated Date: 03/07/2000
Title
2000 - 2001 EDExpress for Windows
Yes
No
Cancel
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

Title: 2000-2001 SAR Received for New Student

```
Welcome!

Our Financial Aid Office has received your 2000-2001 Student Aid Report.  As soon as
we have confirmed your admission to our school for the 2000-2001 academic year, we
will begin processing your financial aid.

If everything in your file                              ceive your financial aid
award within  two weeks.                                entation, we'll contact
you by telephone.  In the                               o contact us if you have
questions.

We sincerely appreciate yo                               forward to serving you.

Sincerely,




Financial Aid Office
```

Record updates pending, save changes?

Apply What You Learned

Complete the following exercise to reinforce what you learned about creating User-Defined Letters

Read each statement and fill in the blank(s)

1 User-defined letters are created in the ______________ module

2 The three categories of user-defined letters that you can create in EDExpress are ______________ , ______________ , and ______________

3 EDExpress provides two types of award letter that typically are sent to students, the ______________ or ______________

4 The system default indicating which type of award letter to generate is selected in the ______________ System setup

5 EDExpress also gives you the option of including with the award letter a ______________ letter, which prints as a supplemental page to remind the student of documents that are needed

6 If you choose to create additional text for the award letter, this additional text prints as ____

7 In the User-Defined Text setup, Document Tracking Letters include 2 blocks of text You can create up to 12 lines of additional text in Text Block ______________

8 In Text Block ______________ of Document Tracking Letters, you can modify the predefined text

9 To restore predefined text for both Award and Document Tracking Letters, you select the ______________ button in User-Defined Text setup

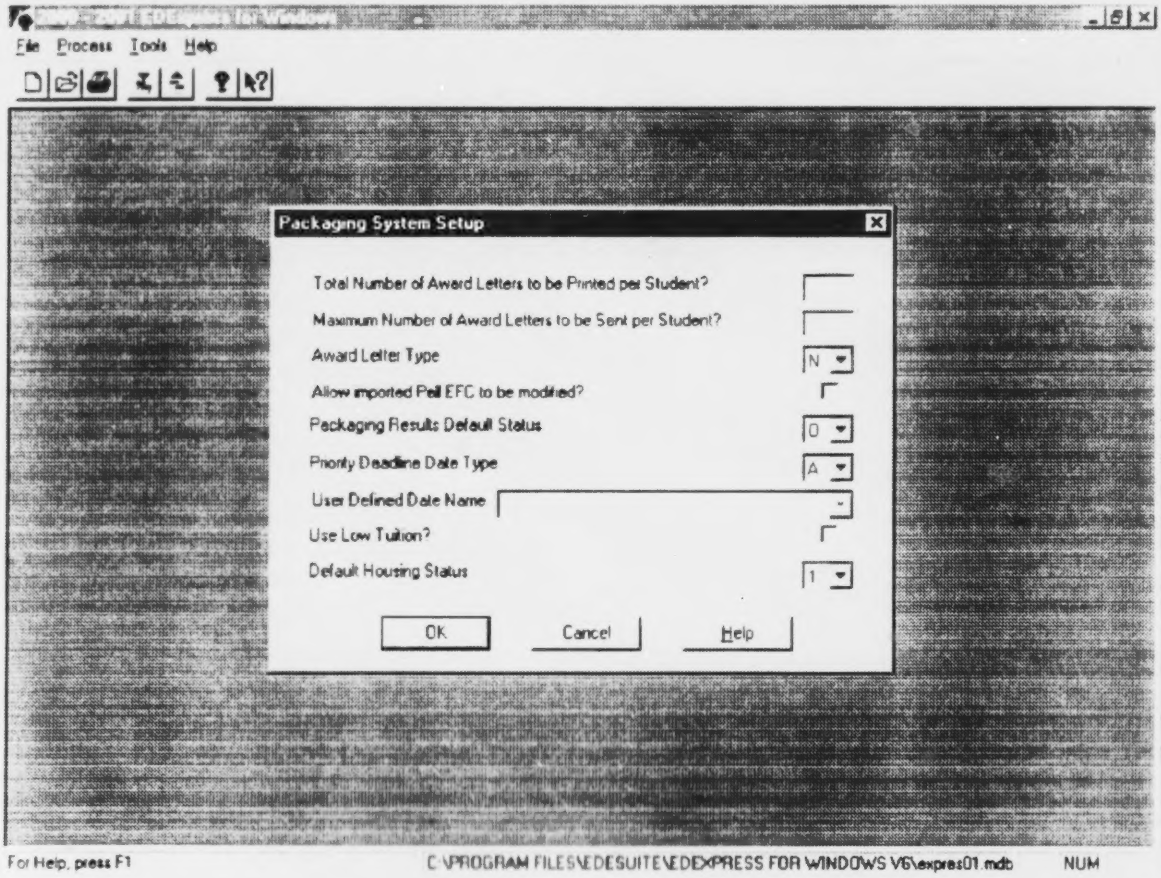
10 You can create up to ______________ general purpose User Letters to send to students

Packaging System Setup

The Packaging System Setup controls parameters for the following functions

- Total Number of Award Letters to be Printed per Student?
- Maximum Number of Award Letters to be Sent per Student?
- Award Letter Type
- Allow Imported Pell EFC to be Modified?
- Packaging Results Default Status
- Priority Deadline Date Type
- User-Defined Date Name
- Use Low Tuition?
- Default Housing Status

Note: Should you need to change any of the parameters of the Packaging System setup after financial aid has been awarded, keep in mind that the system does not retroactively apply the changes you make to previously packaged awards.



Packaging System Setup

Total Number of Award Letters to be Printed per Student?
Maximum Number of Award Letters to be Sent per Student?
Award Letter Type: N
Allow imported Pell EFC to be modified? ☐
Packaging Results Default Status: 0
Priority Deadline Date Type: A
User Defined Date Name
Use Low Tuition? ☐
Default Housing Status: 1

For Help, press F1　C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb　NUM

Total Number of Award Letters to be Printed per Student?

Specify the number of copies generated each time you print a student's award letter. Valid values are 1 to 99. The default number is 2.

Maximum Number of Award Letters to be Sent per Student?

Specify the total number of times an award letter for an individual student will be printed. Valid amounts are 1 to 99. The default value is 5.

[Slide 2-17]

Award Letter Type

Specify the type of award letter that will be printed—*O* (Offer Letter) or *N* (Notification Letter). Although these letter types are informational and don't impact the system in any way, you may want to mach the Award Letter Type with the Packaging Results Default Status.

Allow Imported Pell EFC to be Modified?

Clicking this checkbox allows the Pell EFC imported from the ISIR to be modified and ensures that the Pell EFC can be recalculated.

Packaging Results Default Status

Specify the default option—*O* (Offered) or *A* (Accepted)—you want displayed as the packaging results status for each fund when a student is packaged. The default value can be modified at the student level.

[Slide 2-18]

Priority Deadline Date Type

Specify the date type you want to use to prioritize the order in which student records will be packaged. Default options are *A* (Received Date from ISIR), P (Processed Date from ISIR), R (Ready Date based on date ISIR record is imported into Packaging database), and U (User Defined Date from User Database).

User-Defined Date Name

If you select U as your Priority Deadline Date Type, select the Priority Deadline Date you wish to use from the list of User-defined Dates created in the User Database. This field is enabled only if the Priority Deadline Date Type is set to *U*.

Use Low Tuition?

Select this option to use the Alternate Pell Grant Payment Schedules for Students with Low Assessed Tuition.

Default Housing Status

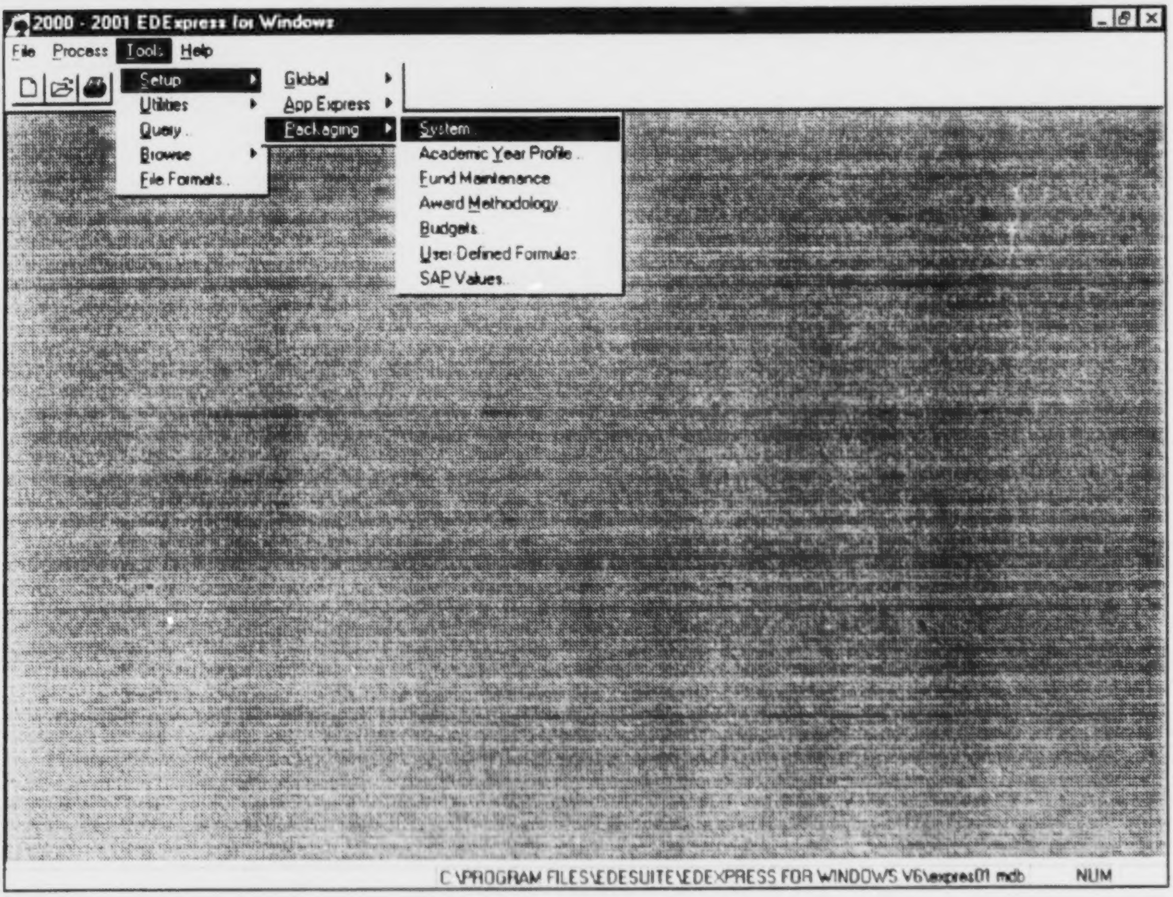
NEW!

Indicate the default housing value for records created manually and for ISIR imports having a blank housing code. Valid values are *1* (On-campus), *2* (Off-campus), and *3* (With parents). The system default value is 2.

[Slide 2-19]

Referring to the sample Packaging System Setup Worksheet on the following page, let's look at how to set each parameter in the software.

*Select **Tools/Setup/Packaging/System** from the menu bar*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Setup
Utilities
Query...
Browse
File Formats...
Global
App Express
Packaging
System...
Academic Year Profile...
Fund Maintenance
Award Methodology...
Budgets...
User Defined Formulas
SAP Values...
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\express01.mdb
NUM

Packaging System Setup Worksheet

Enter total number of award letters to be printed per student.	2
Enter maximum number of award letters to be sent per student.	5
Enter Award Letter Type	☐ O (Offer) ☒ N (Notification)
Allow Pell EFC to be modified?	☒ Yes ☐ No
Enter Packaging Results Default Status	☐ O (Offered) ☒ A (Accepted)
Enter Priority Date Deadline Type	☒ A (Received Date) ☐ P (Processed Date) ☐ R (Ready Date) ☐ U (User Defined Date)
User Defined Date Name (required for Priority Date Deadline Type U)	
Use Low Tuition?	☐ Yes ☒ No
Enter Default Housing Status	☒ 1 (On campus) ☐ 2 (Off campus) ☐ 3 (With parent)

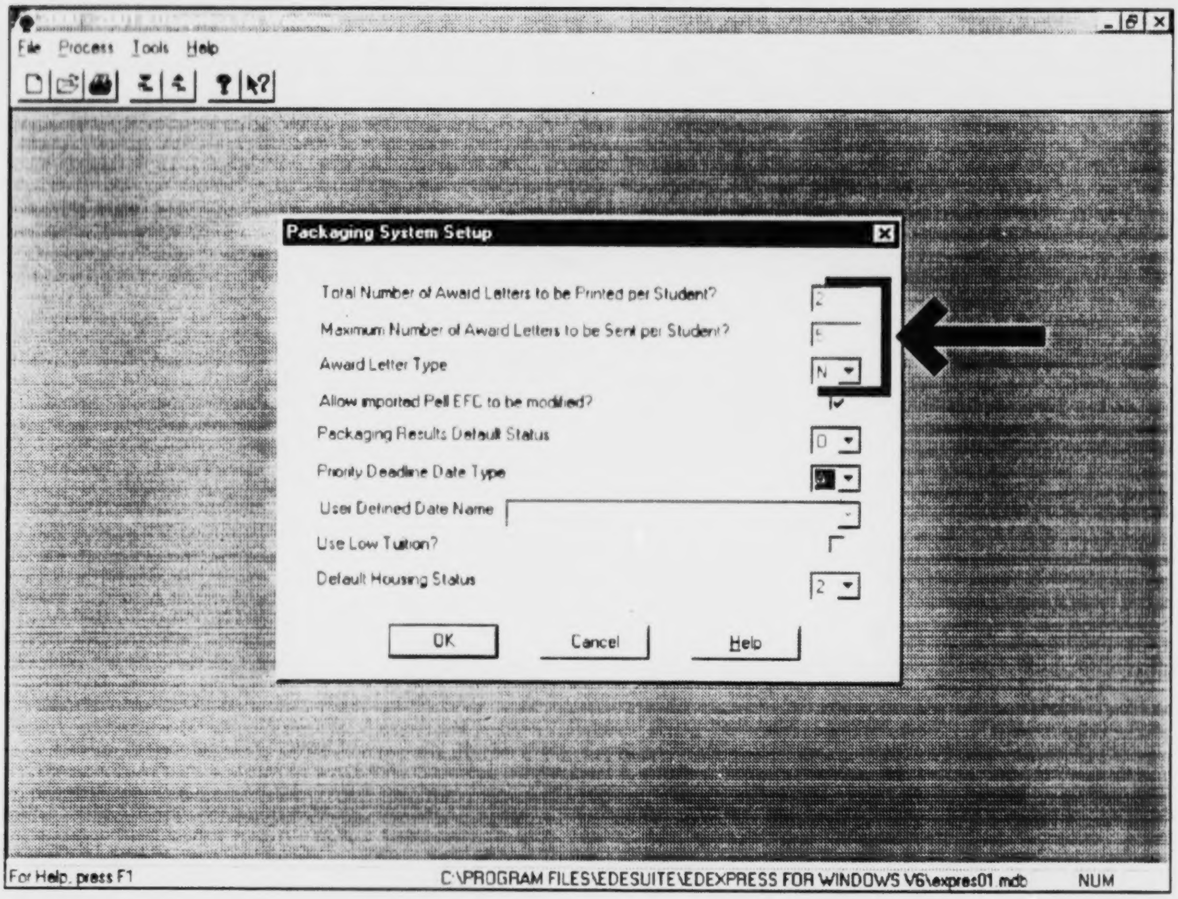
The Packaging System Setup dialog box displays

*Enter values for the **Total Number of Award Letters to be Printed per Student** and for the **Maximum Number of Award Letters to be Sent per Student***

*Click the **Award Letter Type** down arrow to select the default award letter to print*

O = Offer Letter

N = Notification Letter



Packaging System Setup

Total Number of Award Letters to be Printed per Student? 2

Maximum Number of Award Letters to be Sent per Student? 5

Award Letter Type N

Allow imported Pell EFC to be modified? ☑

Packaging Results Default Status D

Priority Deadline Date Type [illegible]

User Defined Date Name

Use Low Tuition? ☐

Default Housing Status 2

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb NUM

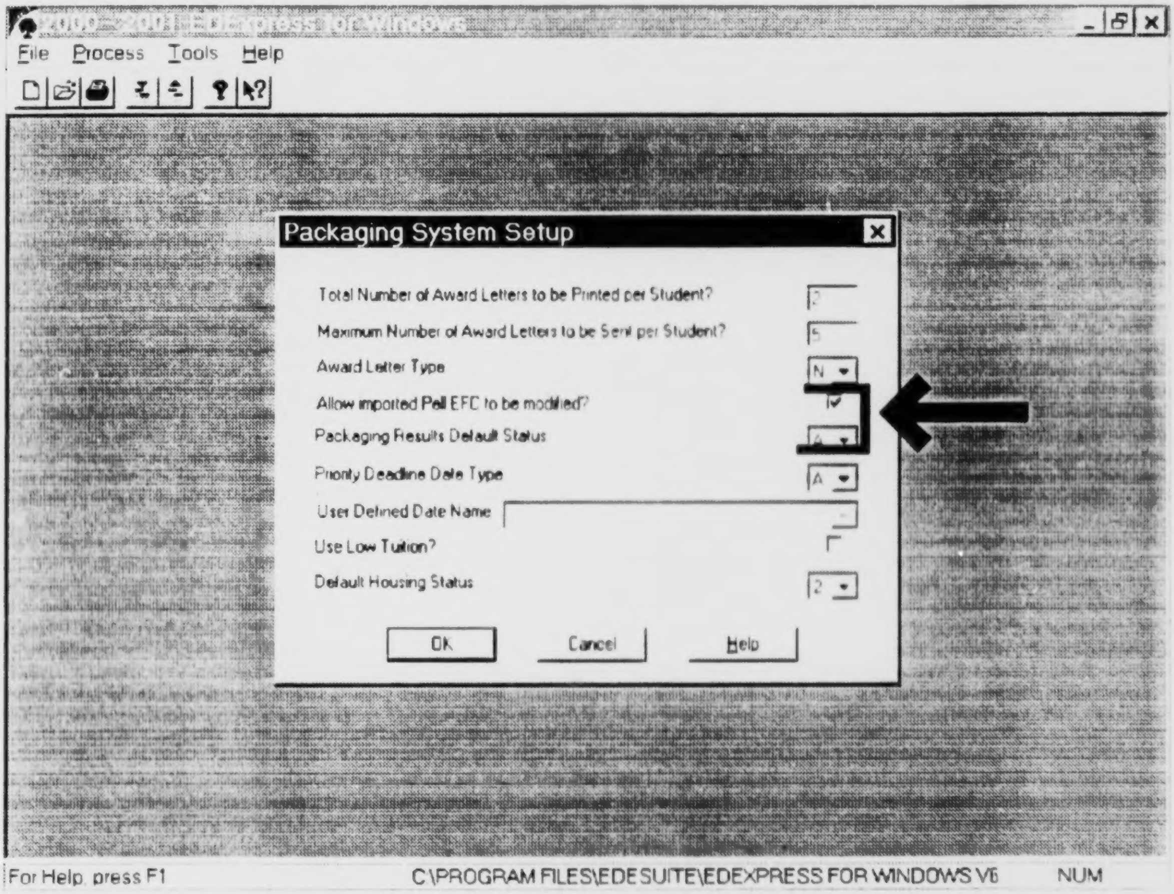
Click the checkbox on ***Allow Imported Pell EFC to be Modified?*** *if you want to allow the Pell EFC field imported from the ISIR record to be modified*

Set the default value for the ***Packaging Results Default Status*** *by clicking the drop down arrow and selecting one of the two options*

O = Offered

A = Accepted

Enabling the *Allow Imported Pell EFC to be Modified* checkbox ensures that the Pell EFC can be recalculated when working with packaging records


2000-2001 EDExpress for Windows
File
Process
Tools
Help

Packaging System Setup

Total Number of Award Letters to be Printed per Student? 2
Maximum Number of Award Letters to be Sent per Student? 5
Award Letter Type N
Allow imported Pell EFC to be modified? ☑
Packaging Results Default Status A
Priority Deadline Date Type A
User Defined Date Name
Use Low Tuition? ☐
Default Housing Status 2

OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

Note: The User Defined Date Name field is enabled only if the Priority Deadline Date Type is U. Remember, if the field is enabled, the user-defined date must already exist in the User Database.

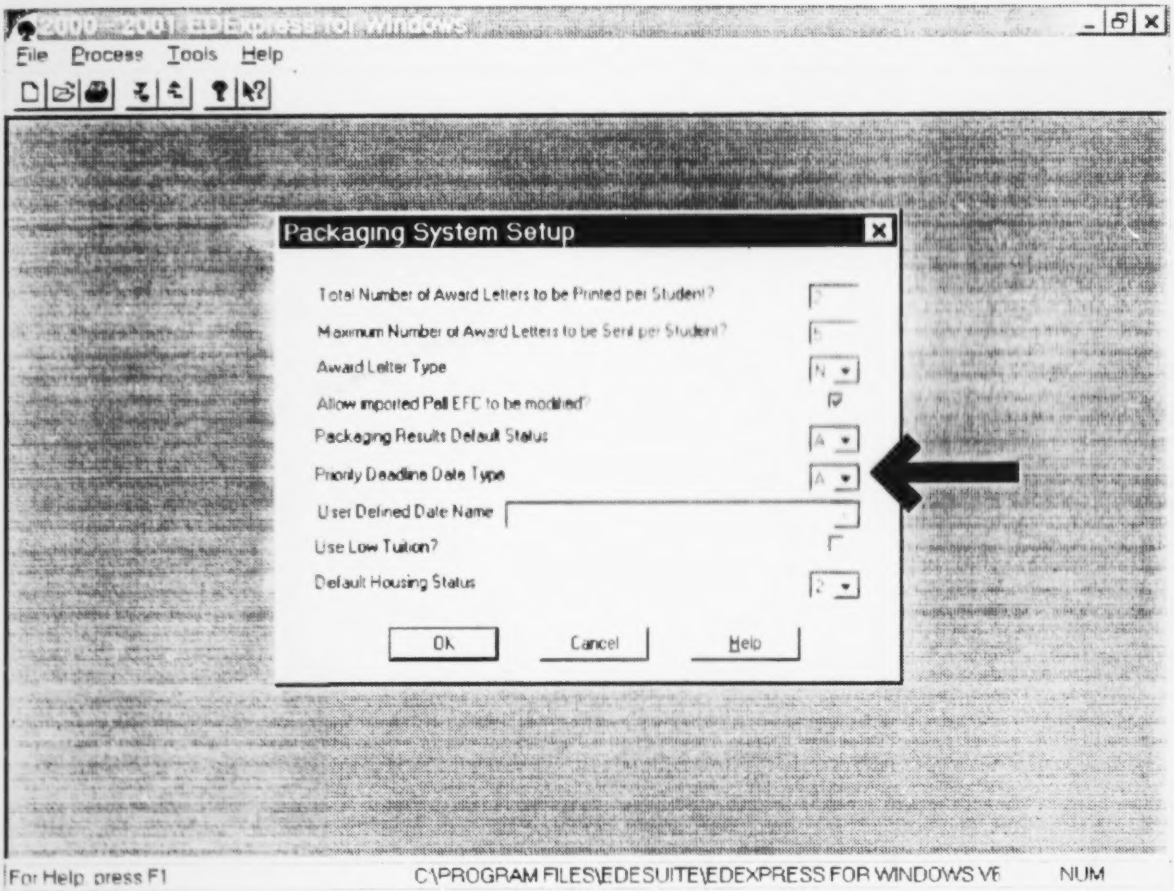
Click the **Priority Deadline Date** down arrow to select the default value for the date type you wish to use when indexing for packaging process and reports.

A = Received Date

P = Processed Date

R = Ready Date

U = User Defined Date


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Packaging System Setup
OK
Cancel
Help

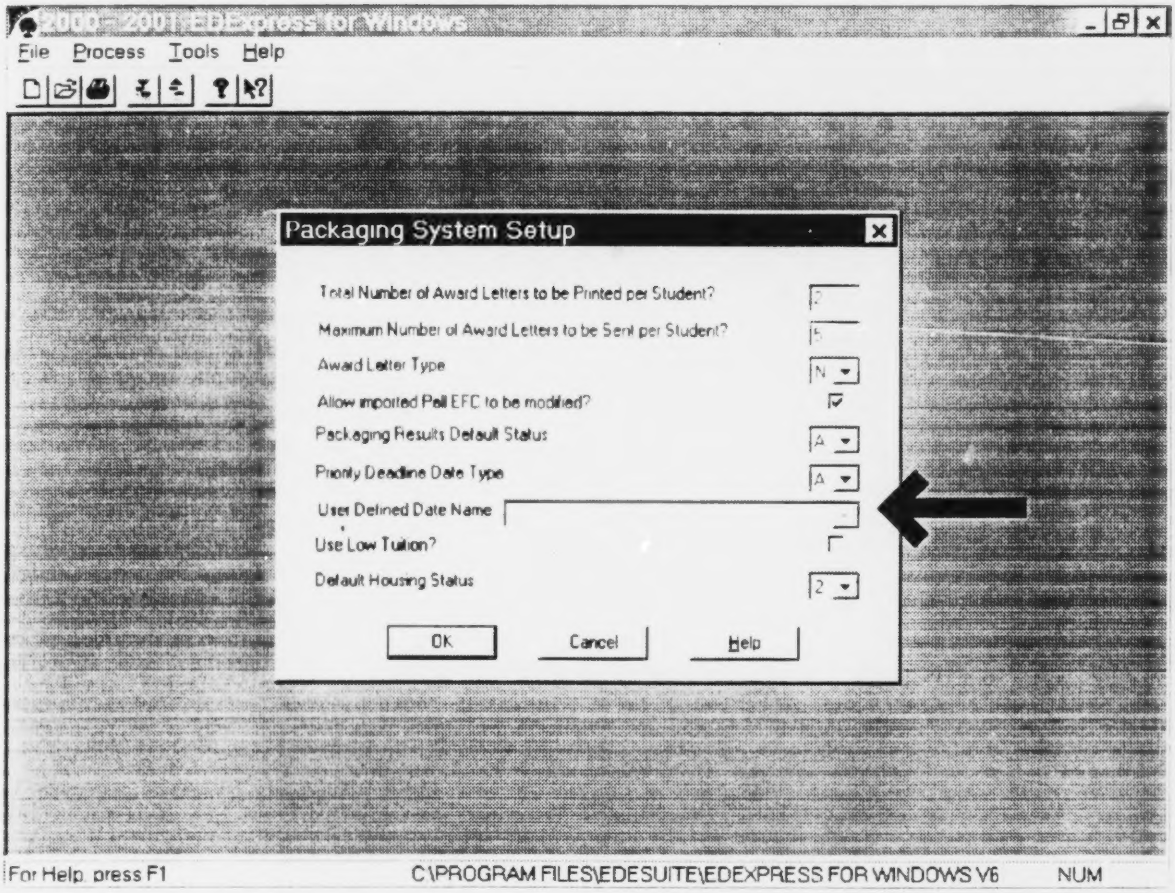
Total Number of Award Letters to be Printed per Student? 2
Maximum Number of Award Letters to be Sent per Student? 5
Award Letter Type N
Allow imported Pell EFC to be modified? ☑
Packaging Results Default Status A
Priority Deadline Date Type A
User Defined Date Name
Use Low Tuition? ☐
Default Housing Status 2

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS VE NUM

*Click the down arrow for the **User Defined Date Name** to view a list of all dates setup in the User Database*

Then, select the date to use as the Priority Deadline Date

If you want the system to use the Alternate Pell Grant Schedules for Students with Low Assessed Tuition, click the Use Low Tuition? checkbox


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Packaging System Setup
OK
Cancel
Help

Total Number of Award Letters to be Printed per Student? 2

Maximum Number of Award Letters to be Sent per Student? 5

Award Letter Type N

Allow imported Pell EFC to be modified? ☑

Packaging Results Default Status A

Priority Deadline Date Type A

User Defined Date Name

Use Low Tuition? ☐

Default Housing Status 2

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6 NUM

The Packaging Setup now includes a Default Housing Code option

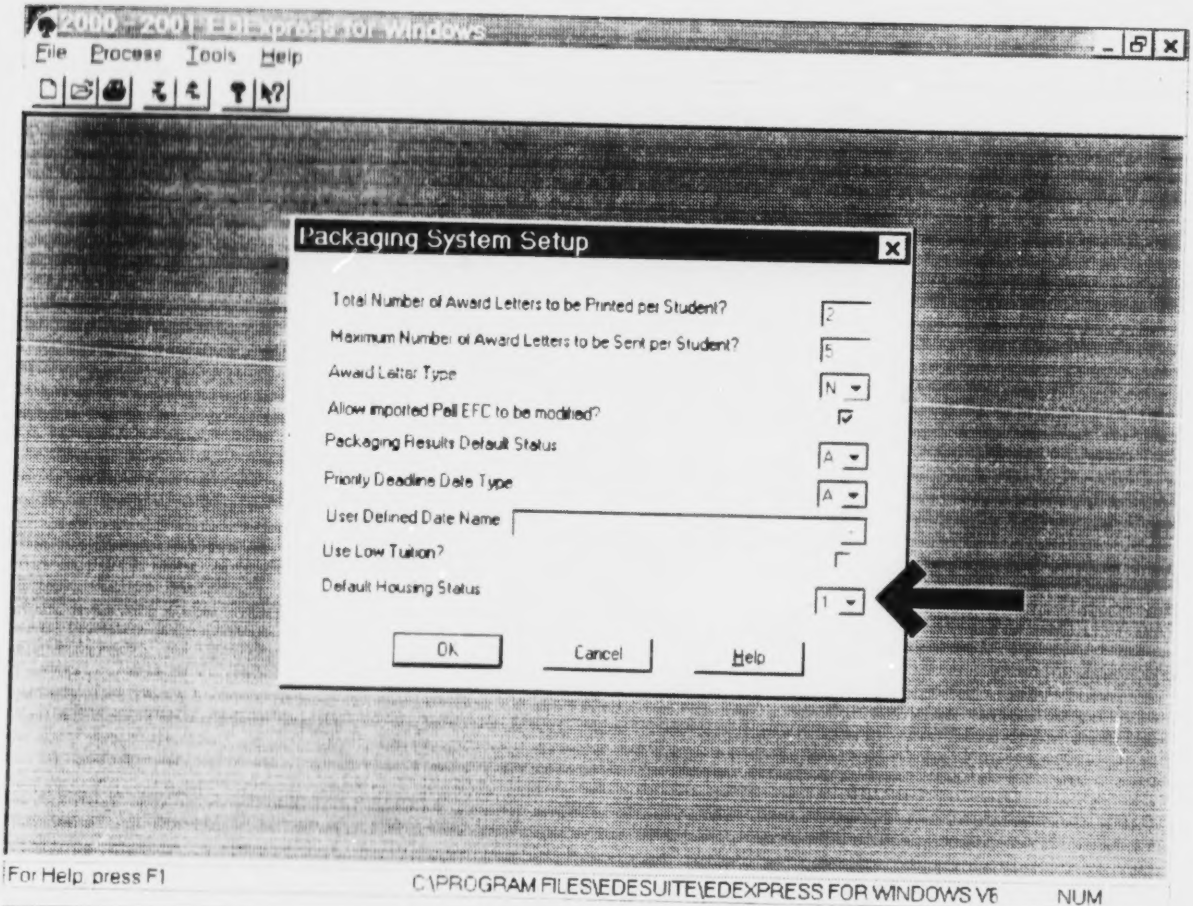
*Click the **Default Housing Status** down arrow to select the default housing value for records created manually and for ISIR imports having a blank housing code*

1 (On-campus)

2 (Off-campus)

3 (With parents)

*Click **OK***


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Packaging System Setup
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

Total Number of Award Letters to be Printed per Student? 2

Maximum Number of Award Letters to be Sent per Student? 5

Award Letter Type N

Allow imported Pell EFC to be modified? ☑

Packaging Results Default Status A

Priority Deadline Date Type A

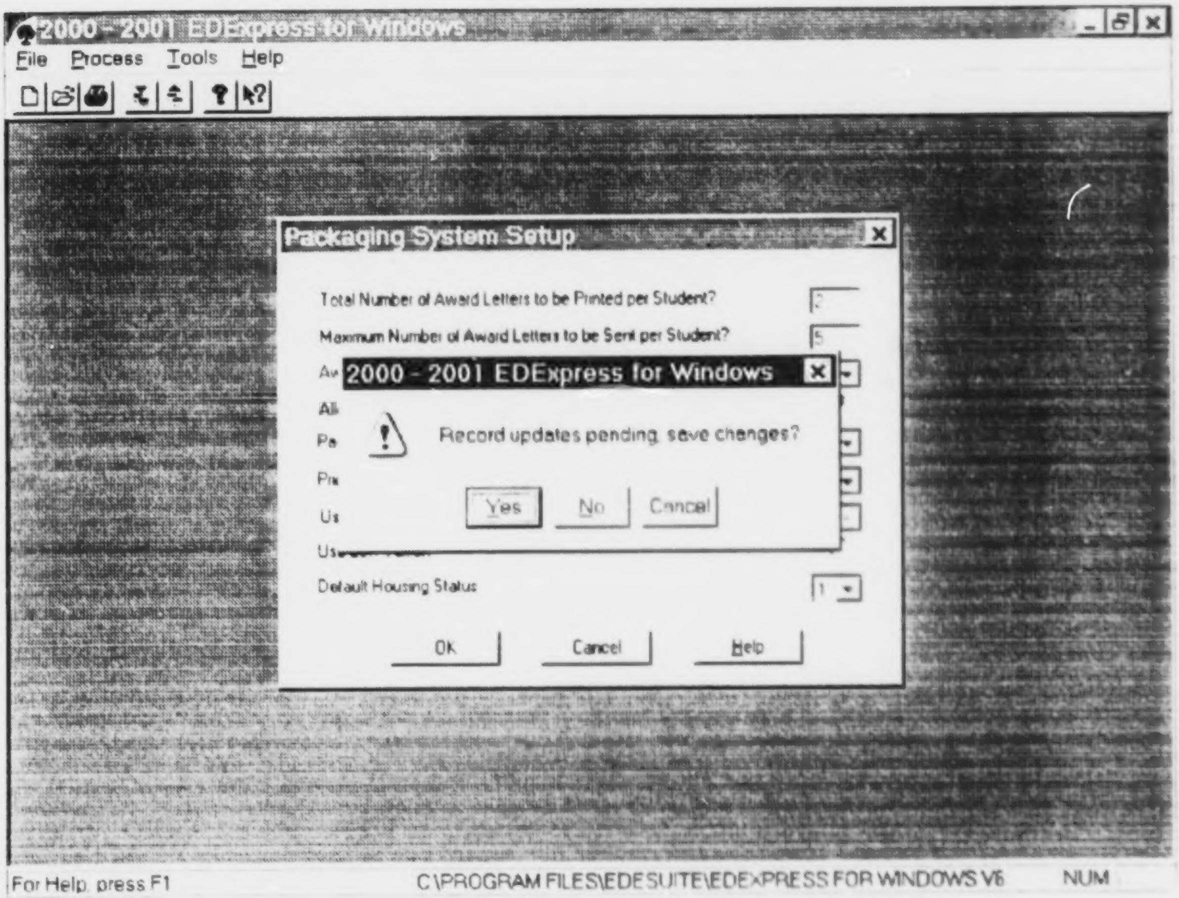
User Defined Date Name

Use Low Tuition? ☐

Default Housing Status 1

A Record Updates Pending, Save Changes dialog box displays

*Click **Yes** to save changes*


2000 - 2001 EDExpress for Windows
File Process Tools Help
Packaging System Setup
2000 - 2001 EDExpress for Windows
Yes
No
Cancel
OK
Cancel
Help
NUM

Total Number of Award Letters to be Printed per Student? 2

Maximum Number of Award Letters to be Sent per Student? 5

Record updates pending, save changes?

Default Housing Status 1

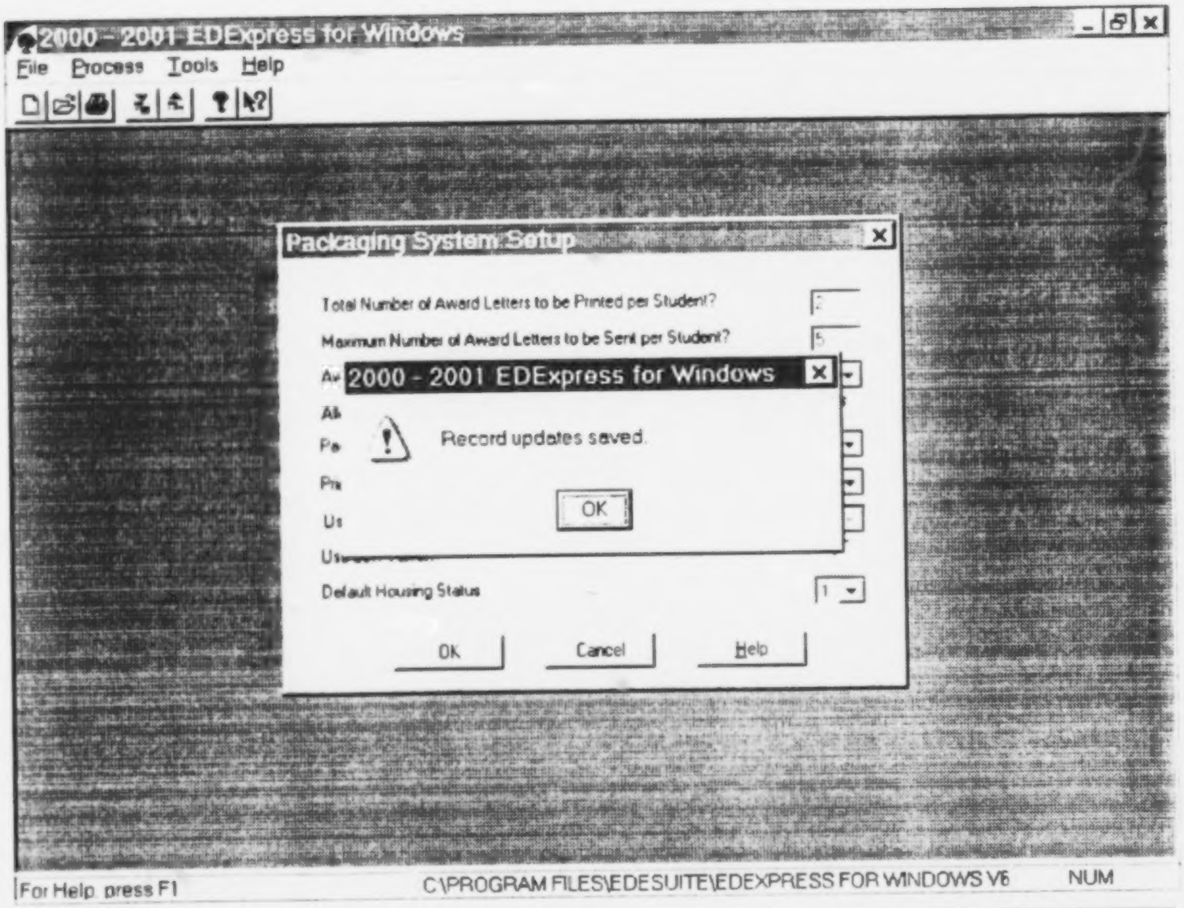
For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6

A Records Updates Saved dialog box displays

Click ***OK***

The dialog box closes and you are returned to the main menu



2000 - 2001 EDExpress for Windows
File Process Tools Help
Packaging System Setup

Total Number of Award Letters to be Printed per Student? 2

Maximum Number of Award Letters to be Sent per Student? 5

2000 - 2001 EDExpress for Windows

Record updates saved.

OK

Default Housing Status 1

OK
Cancel
Help

For Help, press F1

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NUM

Unit 2—Setup

Lesson 6

Academic Year Profile

An Academic Year Profile (AYP) defines your school's academic year for a program of study and specifies how you want to package financial aid. To setup an Academic Year Profile, you need to transfer various information about your school to the software. This information includes:

[Slide 2-20]

- Types of programs (standard, non-standard)
- Types of credits awarded (credit hours, clock hours)
- Types of terms (semester, quarter, trimester)
- Number of terms
- Length of terms
- Fund allocation (by what percentage aid will be allocated over terms)
- Pell formula(s) used

[Slide 2-21]

Some schools may have only one profile, while others must create multiple profiles to accommodate various programs of study. For example, your school may have academic programs with different start dates. Or perhaps your school has programs of varying lengths. Because the EDExpress Packaging module is designed to provide maximum flexibility, you are able to create as many AYPs as you need.

Each AYP you create will include:

- Four-character code
- Descriptive title
- Pell Grant formula and appropriate program proration percent
- EFC program length to import from the ISIR database
- Terms (you may specify up to five) for use in the Packaging process
- Default enrollment status for each term
- By fund type, percentage of aid dollars to be allocated across terms

You may delete or edit an Academic Year Profile as long as that profile has not been assigned to a student packaging record. It is important to note that an AYP must be assigned in order to package a student record. However, once a student record is packaged, the AYP code for that record cannot be changed.

[Slide 2-22 and 2-23]

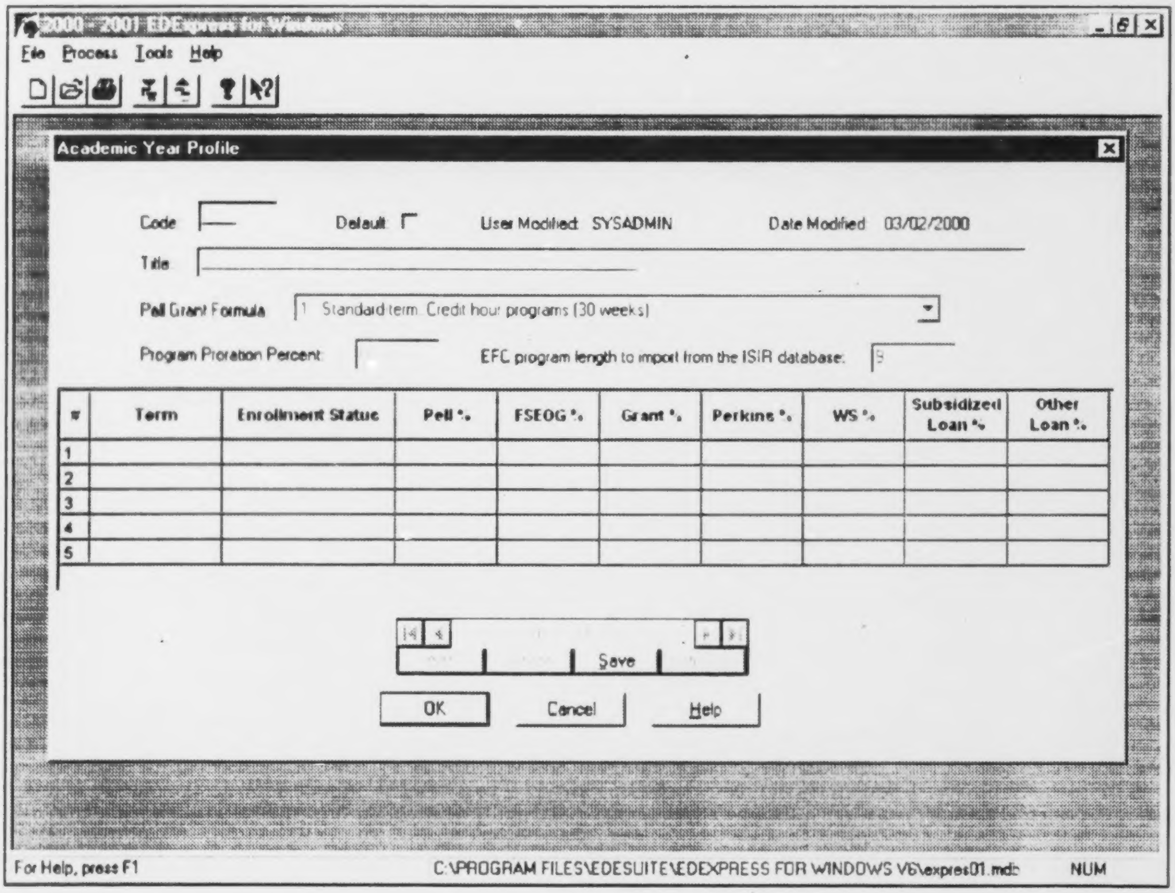
Default

Although you are able to create as many AYPs as needed, you may designate only **one** AYP as the default profile. The default profile is automatically assigned to student packaging records when you import ISIRs from the App Express database. This default value can be changed each time you import ISIRs. Changing the default AYP does not impact profiles previously assigned to student packaging records.

Code

This field cannot be blank, but must contain a unique four-character code that identifies the particular profile or methodology. The code can consist of any combination of uppercase letters (A-Z) and numbers (0-9). When space is available, this code prints on reports and displays on screens.

You cannot change the code after you have added the AYP record to the database. To change the code, you must delete the AYP record and start over. However, you can only delete an AYP that has not been assigned to a student record.



Code
Default ☐
User Modified: SYSADMIN
Date Modified: 03/02/2000
Title
Pell Grant Formula: 1 Standard term: Credit hour programs (30 weeks)
Program Proration Percent
EFC program length to import from the ISIR database: 9

#	Term	Enrollment Status	Pell %	FSEOG %	Grant %	Perkins %	WS %	Subsidized Loan %	Other Loan %
1									
2									
3									
4									
5									

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Title

This field cannot be blank, it must contain a description of the AYP. When space is available, the title prints on reports and displays on screens. Titles can consist of any valid keyboard character, except the pipe symbol (|). You cannot change the title once a student packaging record has been assigned to the AYP.

Pell Grant Formula

This field cannot be blank, it is based on your school's definition of an academic year. Your Pell Grant formula selection determines whether you need to complete the Program Proration Percent and the Pell % fields. Use the following table to decide what to complete. An "X" means you must complete the field.

Pell Grant Formula	Program Proration Percent	Pell %
1 Standard term, credit hour programs (30 weeks)		
2 Standard term, credit hour programs (< 30 weeks)	X	
3 Any term based credit hour programs		X
4 Clock hour and credit hour programs without terms	X	X
5 Correspondence Study: non term-based program	X	X
6 Correspondence Study: term-based program		X
Correspondence-based programs may use either Pell Grant Formula 5 or 6. Pell Grant Formula 5 should be used for all Correspondence programs without terms and Pell Grant Formula 6 should be used for all Correspondence programs with terms.		

EFC Program Length to Import

This field identifies the EFC program length (usually 9 months) for student packaging records created by ISIR imports. Pell will always import the 9 month EFC. The system uses this value to calculate the student's EFC.

Term

This field identifies a specific term and can include up to eight alphanumeric characters. For example: Fall, Spring, Mar., Nov., Week #1, Week 2. You can define up to five terms. These labels appear on the packaging record entry screen, on lists, and on reports.

Default Enrollment Status

This field assigns a particular enrollment status for each term you define and cannot be left blank once you enter data for its corresponding term field. Use one of the two methods below to decide which enrollment status to select. Each method has a different effect on the packaging records created with this Academic Year Profile.

System-Defined — You select the default enrollment status that is assigned to each packaging record with this profile. Valid default values include:

- Full Time
- 3/4 time
- 1/2 time
- < 1/2 time (less than 1/2 time)
- Not Enrolled

FAFSA-Defined — Imports student enrollment status responses on the FAFSA during the ISIR import process corresponding to the default value you select. Valid default values include:

- Summer 2000
- Fall 2000
- Winter 2000-2001
- Spring 2001
- Summer 2001

You can change the default values pertaining to individual student records until the student records are packaged. The value in this field is primarily informational and doesn't impact the system at other levels, with the exception of Pell Grant calculations. Because enrollment status determines the Pell Grant calculation, you must remember to verify the default value for Pell-eligible students.

Percentages

This field defines the percentages of aid awarded from various programs to allocate to specific terms. Valid entries in the table are 00.00 to 100.00, and the sum of percentages for a given program across all terms in the Academic Year Profile cannot exceed 100%. For Pell Grants, the field defaults to AUTO if you selected Pell Grant Formula 1 or 2.

Apply What You Learned

To assist in setting up an academic year profile, it's helpful to have the required information handy. The following page is a blank worksheet that collects the information required in the Academic Year Profile setup.

Complete the blank Academic Year Profile Worksheet from information provided below.

- Your school offers both credit hour and clock hour programs (Pell Grant Formula Three)
- The school year is nine months, consisting of three terms (Term 1, Term 2, and Term 3) of ten weeks each
- Define the Default Enrollment Status to reflect full-time enrollment for each team
- The school participates in Federal Pell Grant, federal campus-based programs (Federal Perkins Loan, Federal Work Study, and Federal SEOG), Federal Family Education Loan (Subsidized Federal Stafford, Unsubsidized Federal Stafford and PLUS loan programs)
- Use TRIM as the code and 2000-2001 Trimester as the description

Academic Year Profile Worksheet

Define a code to identify the Academic Year Profile (up to 4 characters, can be alphanumeric).	__ __ | __ __	
Is this Academic Year Profile the default Academic Year?	Yes ☐	No ☐
Enter the Academic Year Profile Title (can be alphanumeric).		

Enter Pell Grant Formula

1. ☐	Standard Term 30 weeks. (Formula 1)
2. ☐	Standard Term less than 30 weeks. (Formula 2)
3. ☐	Any Term-based credit hour program. (Formula 3)
4. ☐	Clock Hour and Credit Hour without terms. (Formula 4)
5. ☐	Correspondence Study, non term-based program. (Formula 5)
6. ☐	Correspondence Study, term-based program. (Formula 6)

Enter Program Proration Percent for Pell Grant Formuls 2, 4, 5 ________ % (00 to 99)

For calculating the EFC, what is the program length in months?

1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10 ☐ 11 ☐ 12 ☐

Term Breakdown
Percentage across terms cannot exceed 100%
Enter Pell percent for Pell Formulas 3, 4, 5, 6

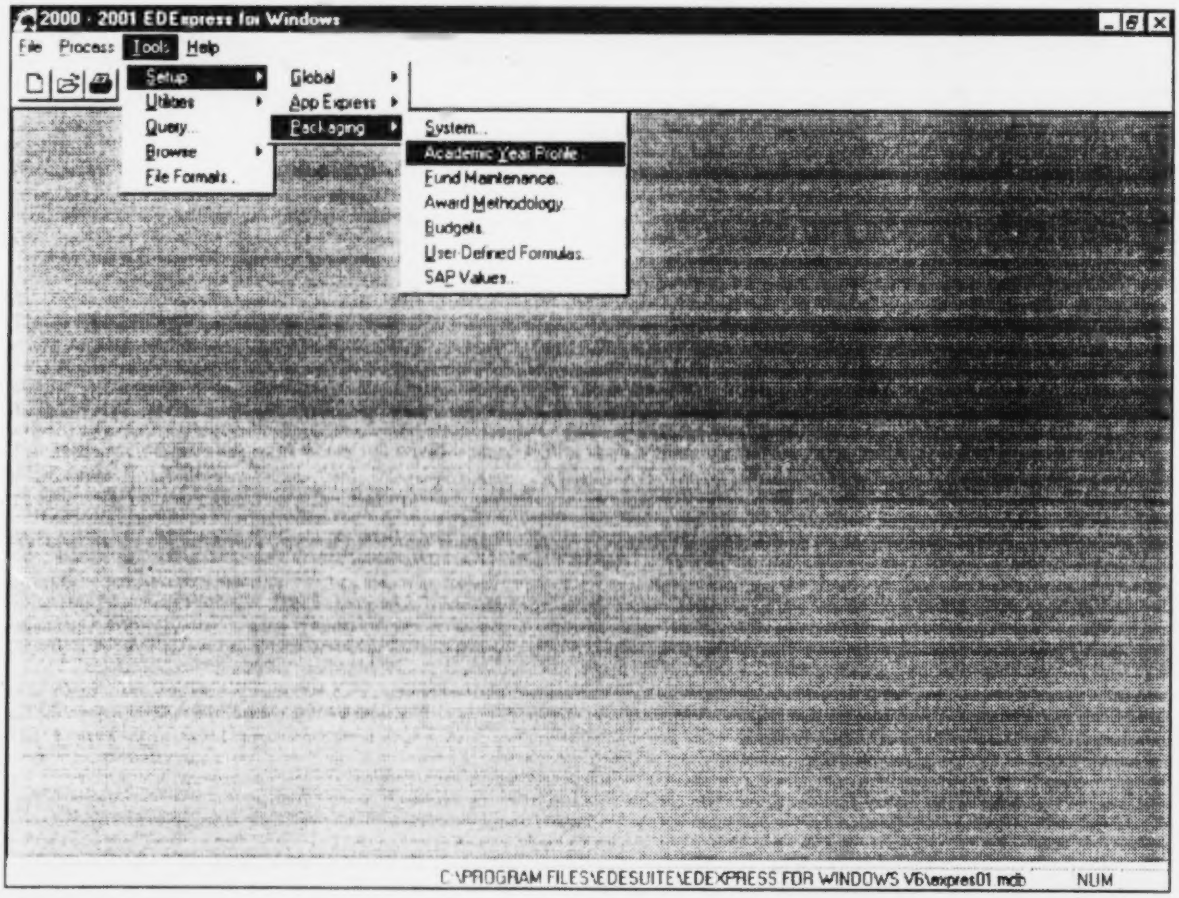
Term Name (Free Form)	Default Enrollment Status (F, ¾, ½, < ½, Fall 2000, Winter 2000, etc.)	Pell %	SEOG %	Grant %	Perkins %	WS %	Subsidized Loan %	Other Loan %

Creating an Academic Year Profile Record

To create an Academic Year Profile

Select ***Tools/Setup/Packaging/Academic Year Profile*** *from the menu bar*

The following example demonstrates how to create an Academic Year Profile (Refer to the sample Academic Year Profile worksheet on the following page)


2000 · 2001 EDExpress for Windows
File
Process
Tools
Help
Setup
Utilities
Query...
Browse
File Formats...
Global
App Express
Packaging
System...
Academic Year Profile...
Fund Maintenance...
Award Methodology...
Budgets...
User Defined Formulas...
SAP Values...
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

BEST COPY AVAILABLE

Academic Year Profile Worksheet

Define a code to identify the Academic Year Profile (up to 4 characters, can be alphanumeric).	F S	
Is this Academic Year Profile the default Academic Year?	Yes ☑	No ☐

Enter the Academic Year Profile Title (can be alphanumeric).

2000-2001 Fall/Spring (Standard)

Enter Pell Grant Formula

1. ☑ Standard Term 30 weeks. (Formula 1)
2. ☐ Standard Term less than 30 weeks. (Formula 2)
3. ☐ Any Term-based credit hour program. (Formula 3)
4. ☐ Clock Hour and Credit Hour without terms. (Formula 4)
5. ☐ Correspondence Study, non term-based program. (Formula 5)
6. ☐ Correspondence Study, term-based program. (Formula 6)

Enter Program Proration Percent for Pell Grant Formuls 2, 4, 5 ________% (00 to 99)

For calculating the EFC, what is the program length in months?

1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☑ 10 ☐ 11 ☐ 12 ☐

Term Breakdown

Percentage across terms cannot exceed 100%
Enter Pell percent for Pell Formulas 3, 4, 5, 6

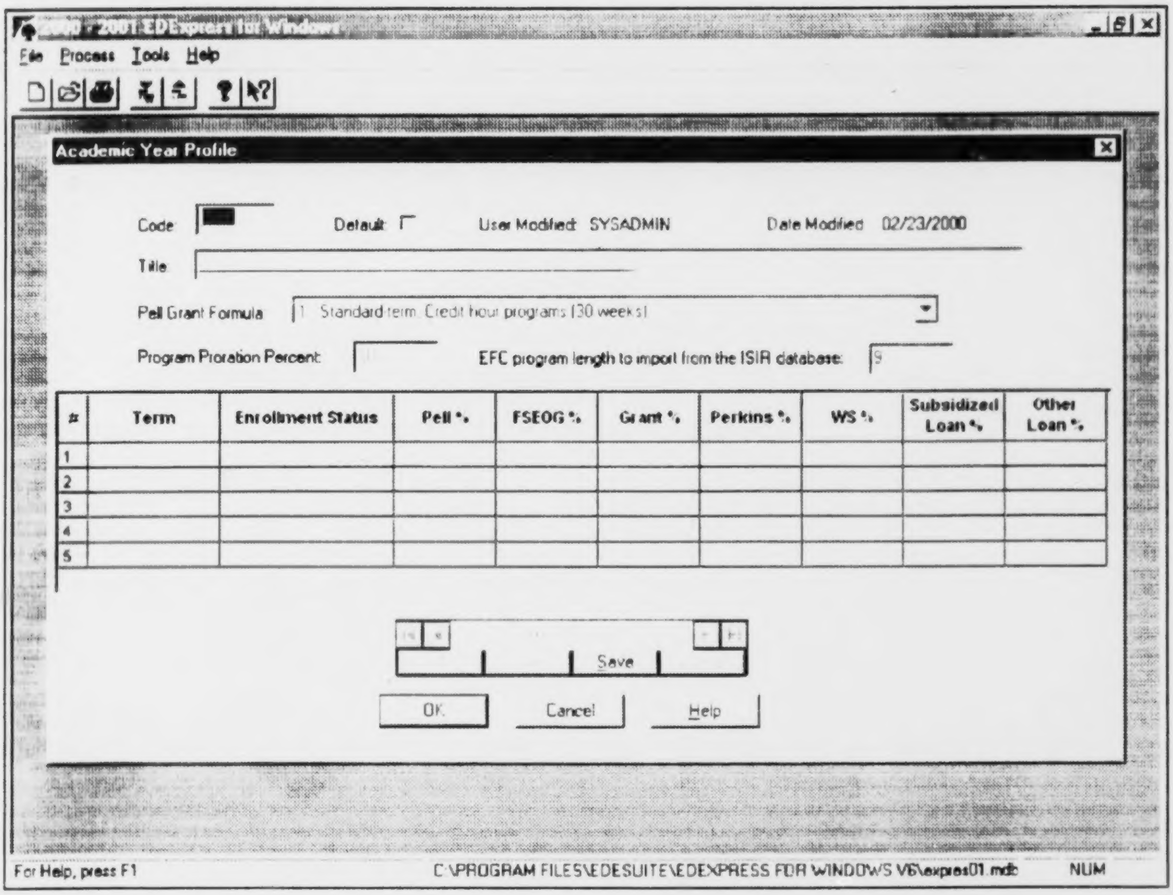
Term Name (Free Form)	Default Enrollment Status (F, ¾, ½, < ½, Fall 2000, Winter 2000, etc.)	Pell %	SEOG %	Grant %	Perkins %	WS %	Subsidized Loan %	Other Loan %
Fall	Full Time		50.00	50.00	50.00	50.00	50.00	50.00
Spring	Full Time		50.00	50.00	50.00	50.00	50.00	50.00

The Academic Year Profile box displays

*If this is the first AYP record begin entering information Otherwise click **Add** to create a new record*

In this example, we create an AYP using Pell Formula 1(standard term, credit hour program, at least 30 weeks)

Tip: You may create as many AYP records as you need


2000 - 2001 EDExpress for Windows
File Process Tools Help
Academic Year Profile

Code

Default ☐

User Modified: SYSADMIN

Date Modified: 02/23/2000

Title

Pell Grant Formula: 1 Standard term, Credit hour programs (30 weeks)

Program Proration Percent

EFC program length to import from the ISIR database: 9

#	Term	Enrollment Status	Pell %	FSEOG %	Grant %	Perkins %	WS %	Subsidized Loan %	Other Loan %
1									
2									
3									
4									
5									

Save
OK
Cancel
Help

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

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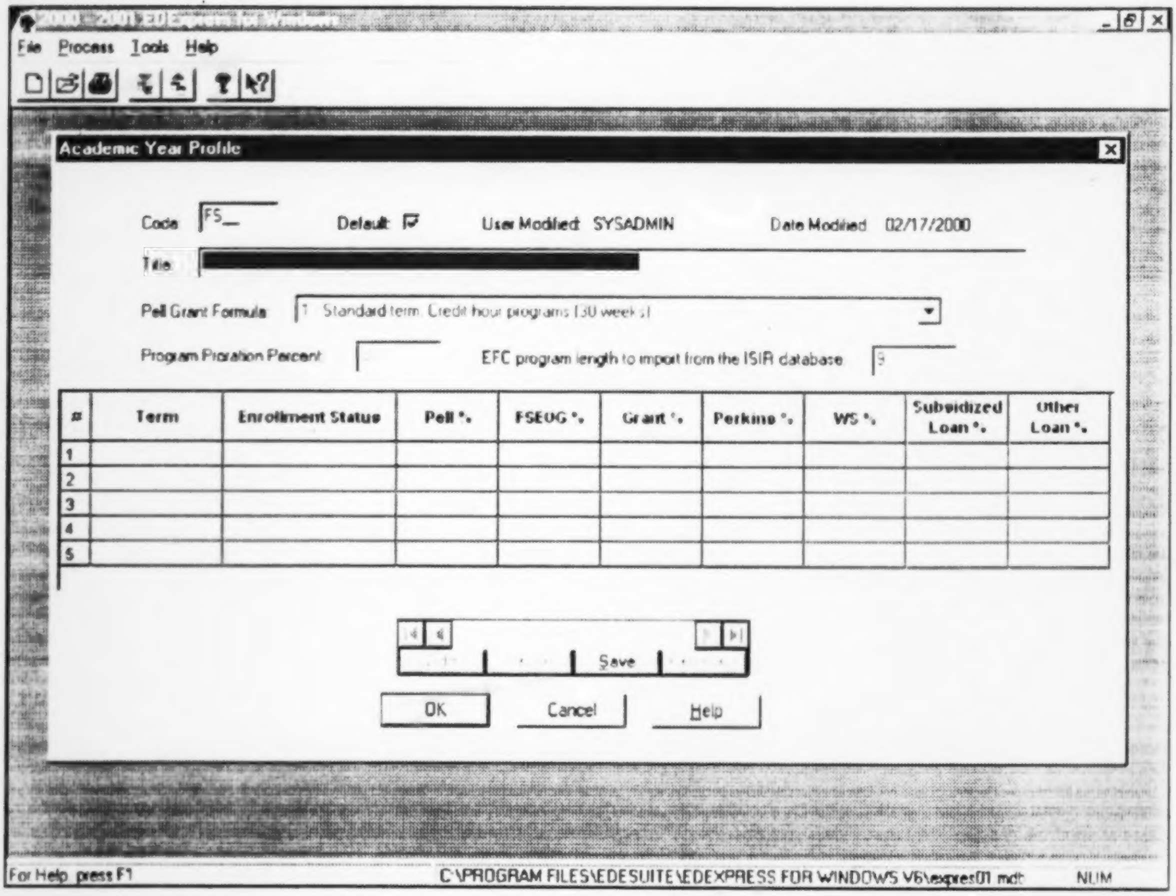
First, enter the ***Code*** *(up to 4 characters) to identify this record.*

Next, decide if this AYP record will be the Default Academic Year Profile. If so, click the ***Default*** *check box.*

Tip: *For the default Academic Year Profile, choose your most common AYP.*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Academic Year Profile
OK
Cancel
Help
Save
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

Code: FS
Default: ☑
User Modified: SYSADMIN
Date Modified: 02/17/2000
Title: [redacted]
Pell Grant Formula: 1 - Standard term, Credit hour programs (30 weeks)
Program Proration Percent:
EFC program length to import from the ISIR database: 9

#	Term	Enrollment Status	Pell %	FSEOG %	Grant %	Perkins %	WS %	Subsidized Loan %	Other Loan %
1									
2									
3									
4									
5									

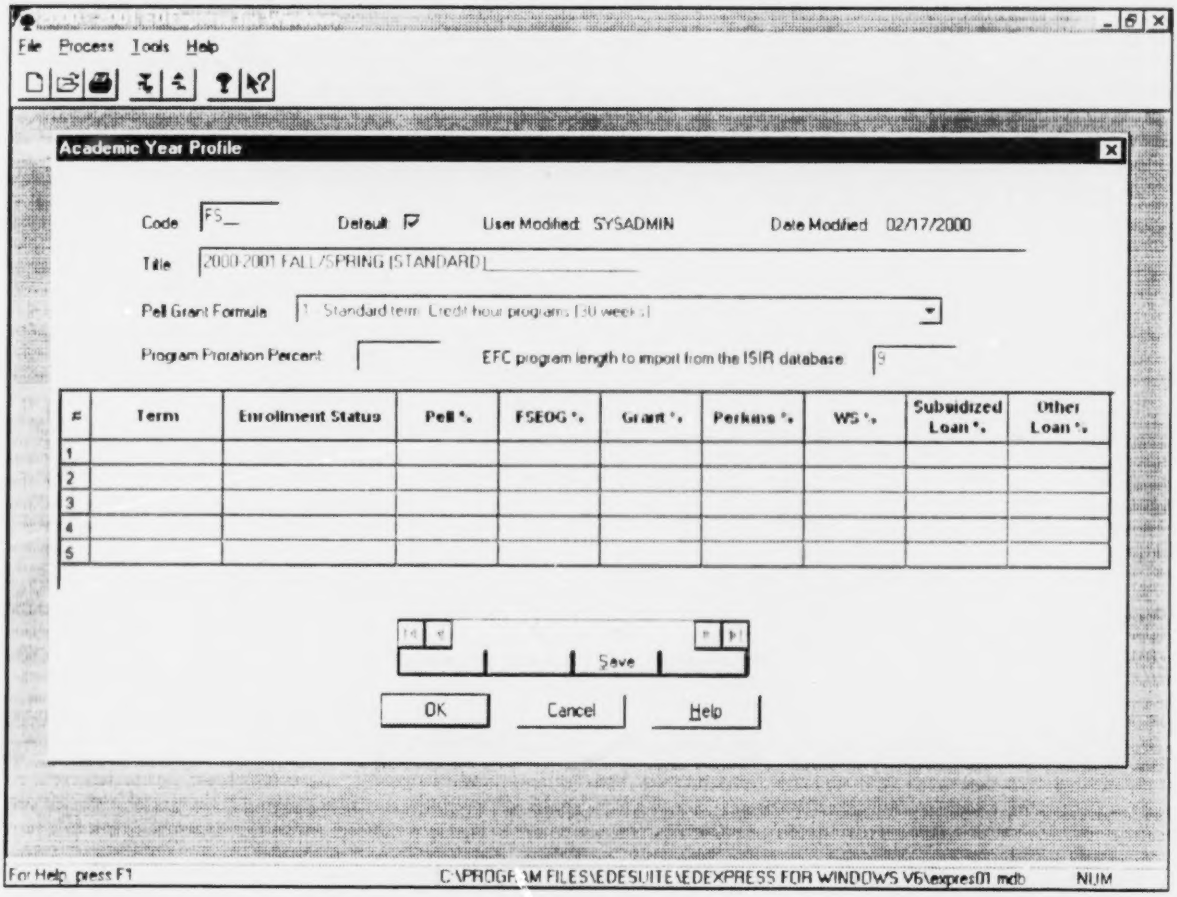
Type a descriptive **Title**

Select the appropriate **Pell Grant Formula** type

Enter the correct number of months for the **EFC Program Length to Import** The number you enter overrides the system default of 9

Tip: *For Pell Grant Formulas 2, 4, or 5, you must enter a Program Proration Percent (0-99)*

Tip: *For Pell Grant Formulas 1, 2, or 6, the Program Proration Percent is automatically grayed out This prevents you from entering data in that field*



Code FS_ Default ☑ User Modified SYSADMIN Date Modified 02/17/2000

Title 2000-2001 FALL/SPRING (STANDARD)

Pell Grant Formula 1 - Standard term Credit hour programs (30 weeks)

Program Proration Percent

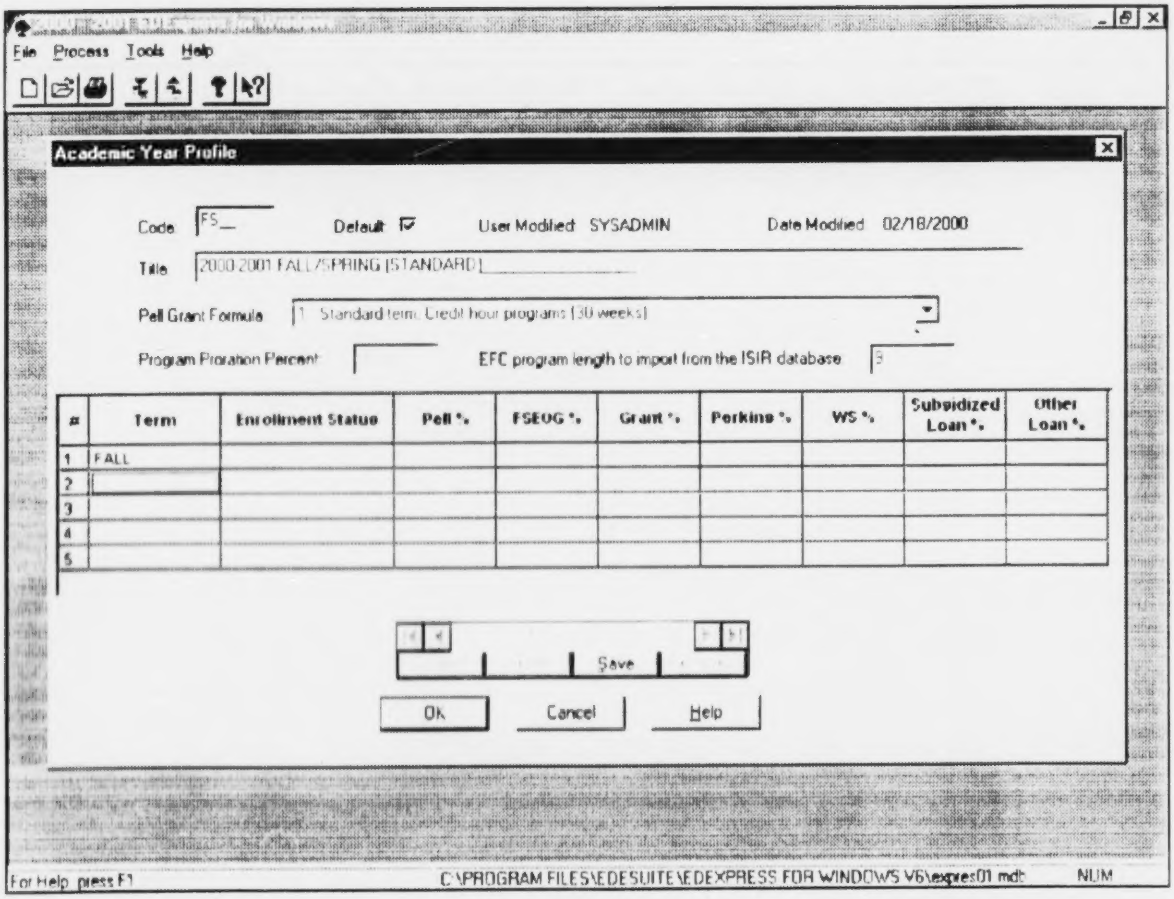
EFC program length to import from the ISIR database 9

#	Term	Enrollment Status	Pell %	FSEOG %	Grant %	Perkins %	WS %	Subsidized Loan %	Other Loan %
1									
2									
3									
4									
5									

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb NUM

Each AYP can have up to 5 terms

Define each ***Term*** *included in the AYP*


File Process Tools Help
Academic Year Profile
Save
OK Cancel Help

Code: FS
Default ☑
User Modified: SYSADMIN
Date Modified: 02/18/2000
Title: 2000-2001 FALL/SPRING (STANDARD)
Pell Grant Formula: 1 - Standard term; Credit hour programs (30 weeks)
Program Proration Percent:
EFC program length to import from the ISIR database: 9

#	Term	Enrollment Status	Pell %	FSEOG %	Grant %	Perkins %	WS %	Subsidized Loan %	Other Loan %
1	FALL								
2									
3									
4									
5									

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb NUM

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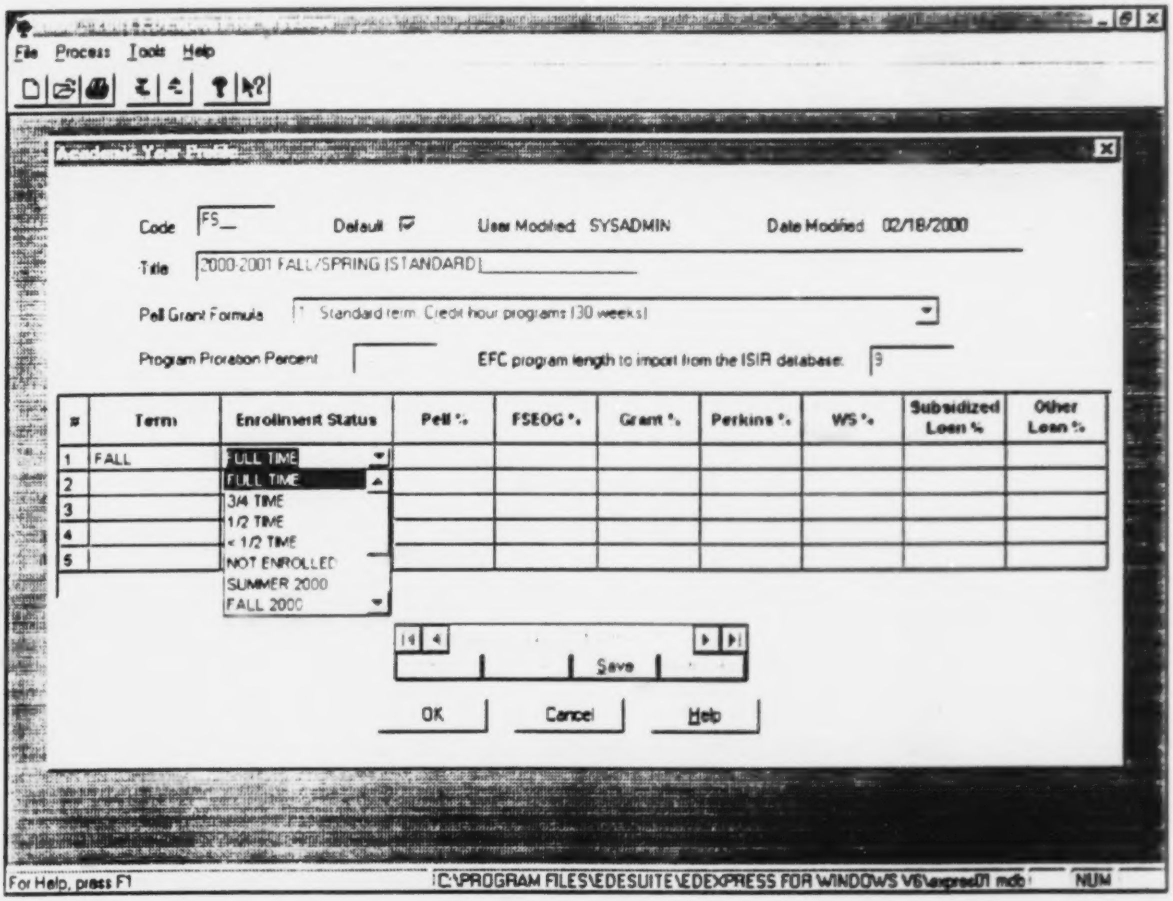
*For each term, define the **Default Enrollment Status***

When packaging, the Pell Grant amount is calculated based on the value entered in the Enrollment Status field.

The default enrollment status can be fixed at full-time, ¾ time, ½ time, or < ½ time. Every packaging record created under this AYP will be assigned this enrollment status.

The other option is to tie the default enrollment status to whatever intended enrollment the student reported on the FASFA. For example, if you assign Fall 2000 as the default enrollment status for the Fall term, the system assigns the intended enrollment for Fall 2000 that the student reported on the FASFA.

Note: The Default Enrollment Status for a particular student's record can be modified before the student is packaged.


File
Process
Tools
Help
Academic Year Profile
FULL TIME
3/4 TIME
1/2 TIME
< 1/2 TIME
NOT ENROLLED
SUMMER 2000
FALL 2000
Save
OK
Cancel
Help
For Help, press F1
NUM

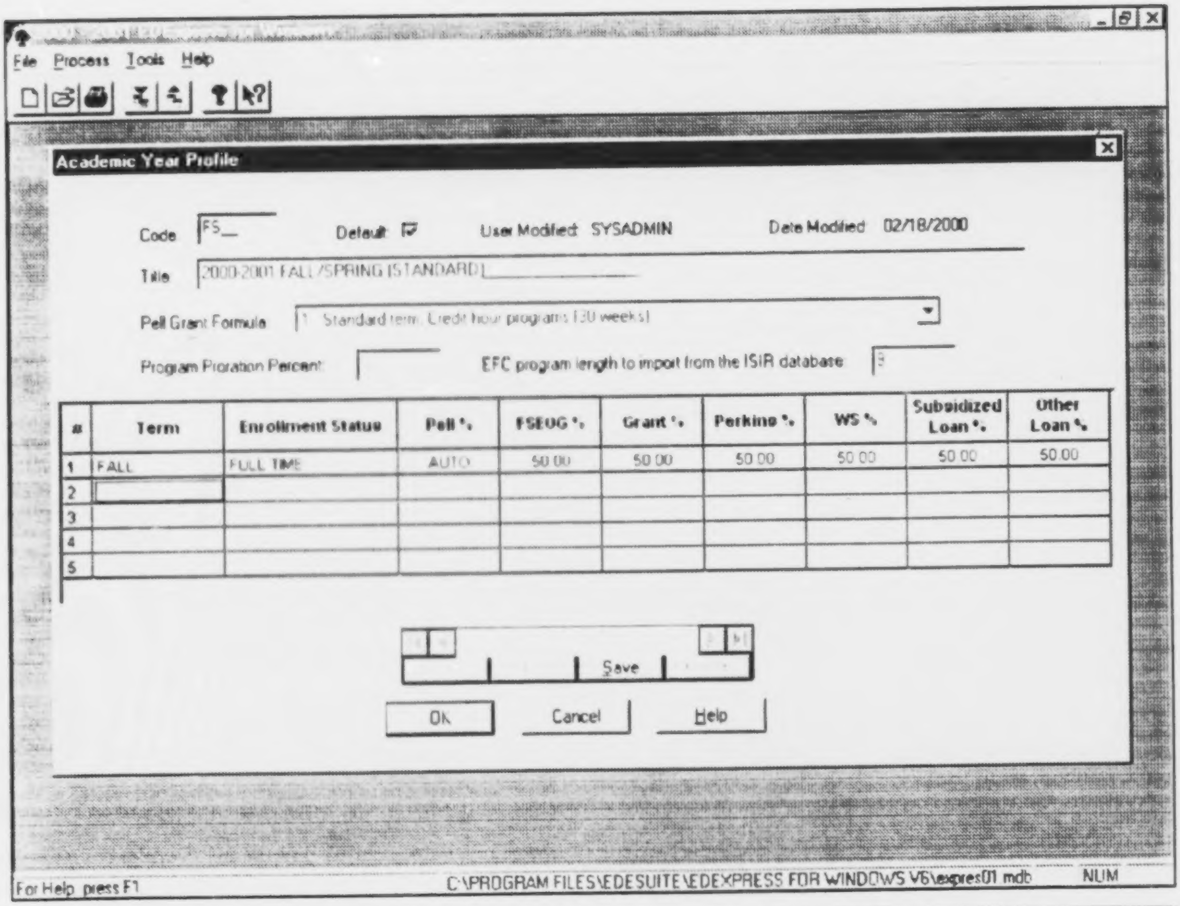
Code: FS
Default ☑
User Modified: SYSADMIN
Date Modified: 02/18/2000
Title: 2000-2001 FALL/SPRING (STANDARD)
Pell Grant Formula: 1 Standard term, Credit hour programs (30 weeks)
Program Proration Percent:
EFC program length to import from the ISIR database: 9

#	Term	Enrollment Status	Pell %	FSEOG %	Grant %	Perkins %	WS %	Subsidized Loan %	Other Loan %
1	FALL	FULL TIME							
2									
3									
4									
5									

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\express01.mdb

Remember: *The sum of the percentages allocated to all terms cannot exceed 100%*

For each type of fund, set the ***Percentage*** *of the award amount to be allocated to the term*



Academic Year Profile

Code: FS
Default: ☑
User Modified: SYSADMIN
Date Modified: 02/18/2000
Title: 2000-2001 FALL/SPRING (STANDARD)
Pell Grant Formula: 1 - Standard term, Credit hour programs (30 weeks)
Program Proration Percent:
EFC program length to import from the ISIR database: 9

#	Term	Enrollment Status	Pell %	FSEOG %	Grant %	Perkins %	WS %	Subsidized Loan %	Other Loan %
1	FALL	FULL TIME	AUTO	50.00	50.00	50.00	50.00	50.00	50.00
2									
3									
4									
5									

For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

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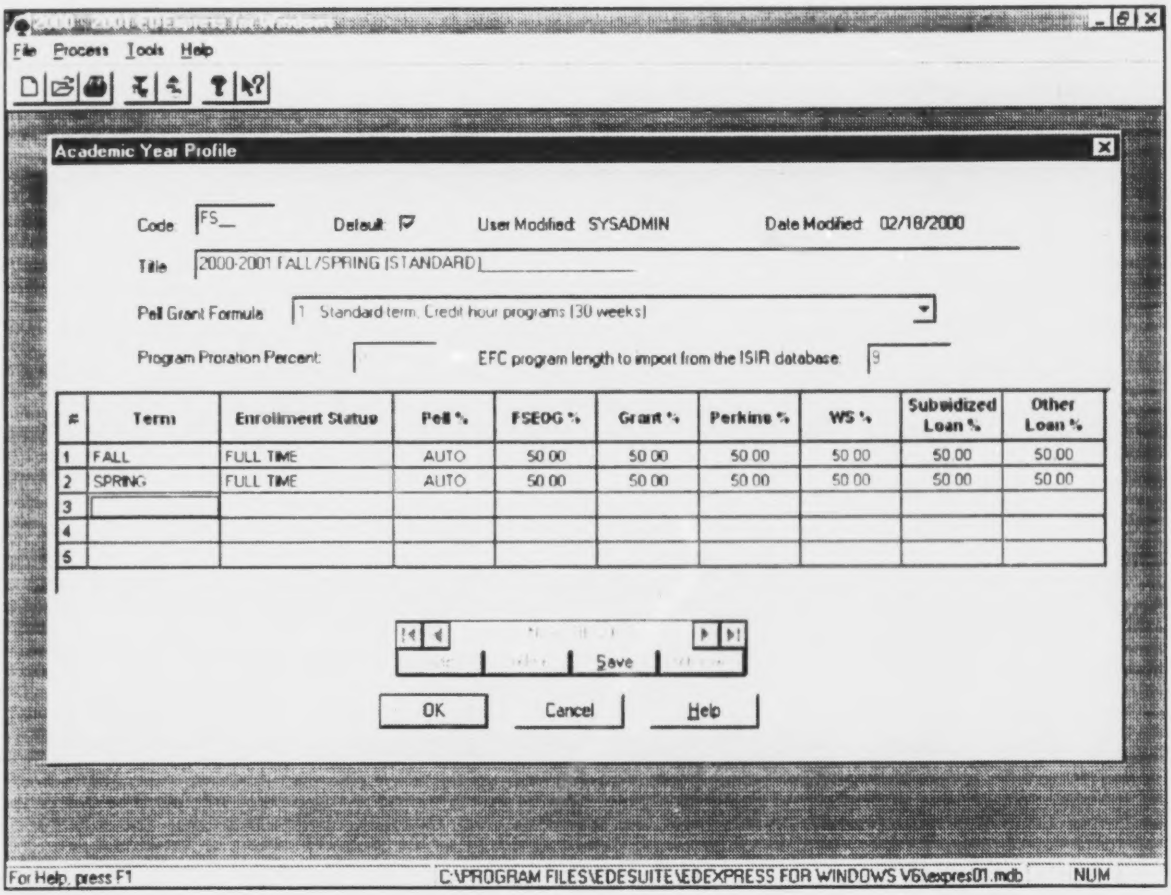
In this example, two terms have been set up—Fall and Spring. Funds are to be distributed equally between each of the two terms, so the percentage entered under each fund type for each term is 50%.

***Note:** For Pell Grant Formulas 1 or 2, the system defaults to AUTO for Pell % and automatically allocates the Pell Grant amount evenly across the number of terms defined.*

For Pell Grant Formulas 3, 4, 5, or 6, enter a value in the Pell % field.



Code: FS

Default: ☑

User Modified: SYSADMIN

Date Modified: 02/18/2000

Title: 2000-2001 FALL/SPRING (STANDARD)

Pell Grant Formula: 1 Standard term, Credit hour programs (30 weeks)

Program Proration Percent:

EFC program length to import from the ISIR database: 9

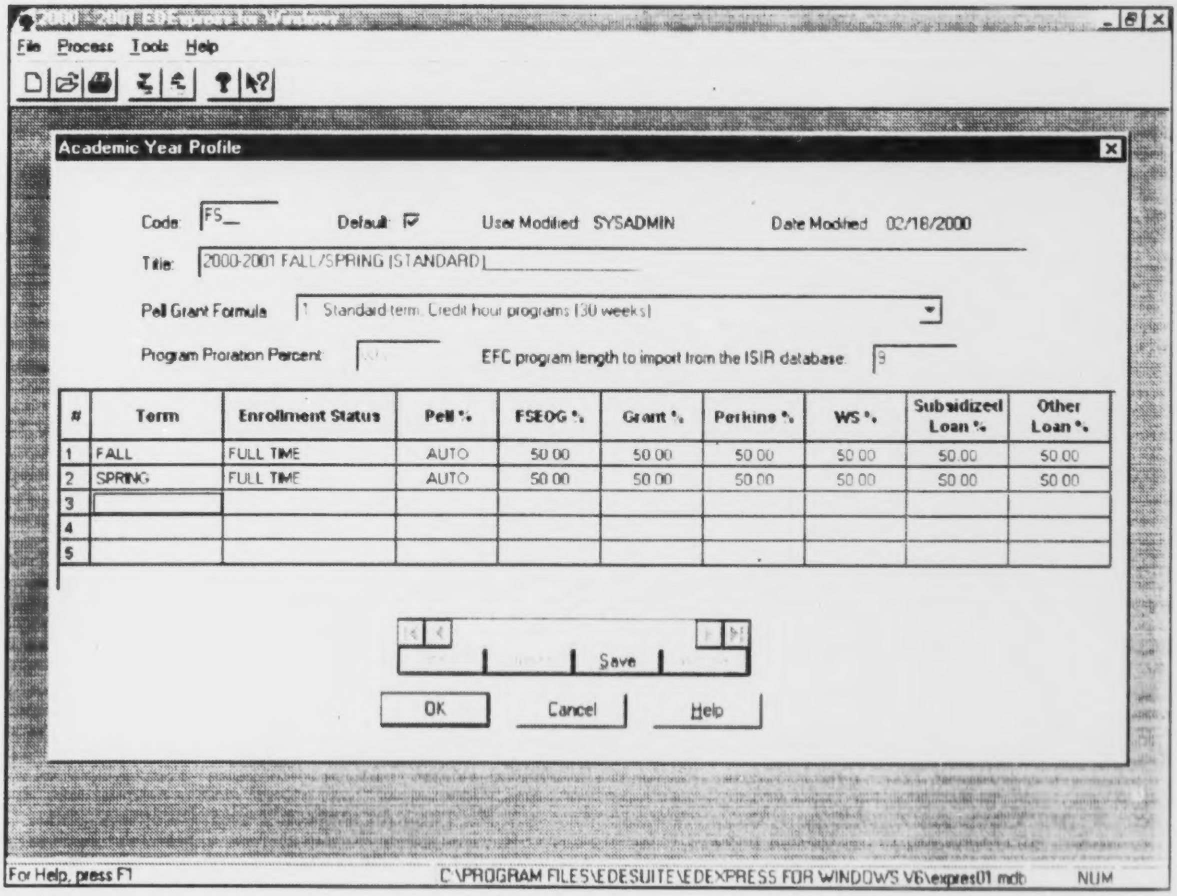
#	Term	Enrollment Status	Pell %	FSEOG %	Grant %	Perkins %	WS %	Subsidized Loan %	Other Loan %
1	FALL	FULL TIME	AUTO	50.00	50.00	50.00	50.00	50.00	50.00
2	SPRING	FULL TIME	AUTO	50.00	50.00	50.00	50.00	50.00	50.00
3									
4									
5									

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

NUM

After the entry is complete, select ***Save***


File
Process
Tools
Help
Academic Year Profile
Save
OK
Cancel
Help
For Help, press F1
NUM

Code: FS

Default: ☑

User Modified: SYSADMIN

Date Modified: 02/18/2000

Title: 2000-2001 FALL/SPRING (STANDARD)

Pell Grant Formula: 1 Standard term, Credit hour programs (30 weeks)

Program Proration Percent:

EFC program length to import from the ISIR database: 9

#	Term	Enrollment Status	Pell %	FSEOG %	Grant %	Perkins %	WS %	Subsidized Loan %	Other Loan %
1	FALL	FULL TIME	AUTO	50.00	50.00	50.00	50.00	50.00	50.00
2	SPRING	FULL TIME	AUTO	50.00	50.00	50.00	50.00	50.00	50.00
3									
4									
5									

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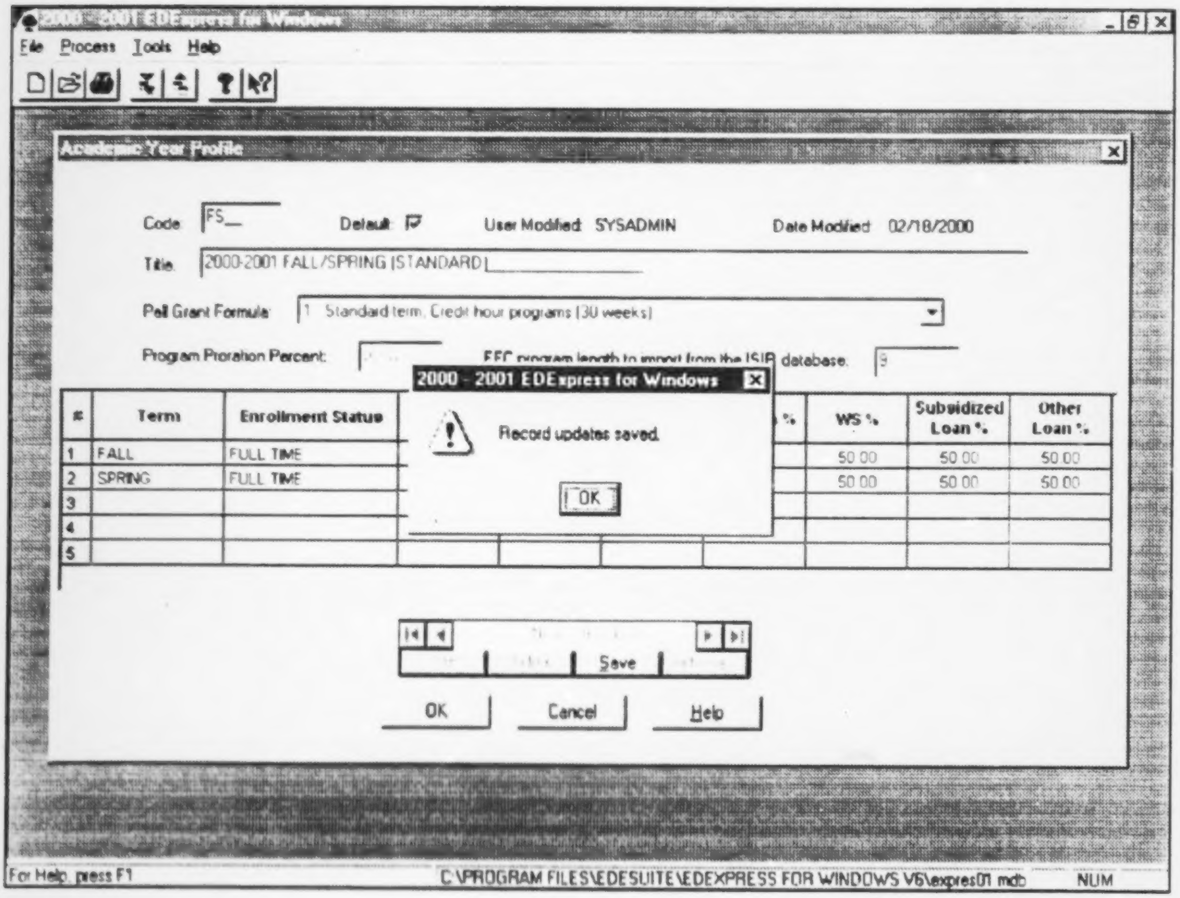
A Record Updates Saved dialog box displays

*Click **Add** to continue entering additional AYPs*

*Otherwise, click **OK** or **Cancel** to exit*

Tip: *Because you can't combine AYPs together in the student's packaging record, you must create an AYP for every possible term combination for which you package aid. For example, Fall & Spring; Fall, Spring & Summer; Spring & Summer; Fall & Summer; etc.*


2000 - 2001 EDExpress for Windows
File Process Tools Help
Academic Year Profile

Code: FS

Default: ☑

User Modified: SYSADMIN

Date Modified: 02/18/2000

Title: 2000-2001 FALL/SPRING (STANDARD)

Pell Grant Formula: 1 Standard term, Credit hour programs (30 weeks)

Program Proration Percent:

EFC program length to import from the ISIR database: 9

#	Term	Enrollment Status	WS %	Subsidized Loan %	Other Loan %
1	FALL	FULL TIME	50.00	50.00	50.00
2	SPRING	FULL TIME	50.00	50.00	50.00
3					
4					
5					

2000 - 2001 EDExpress for Windows

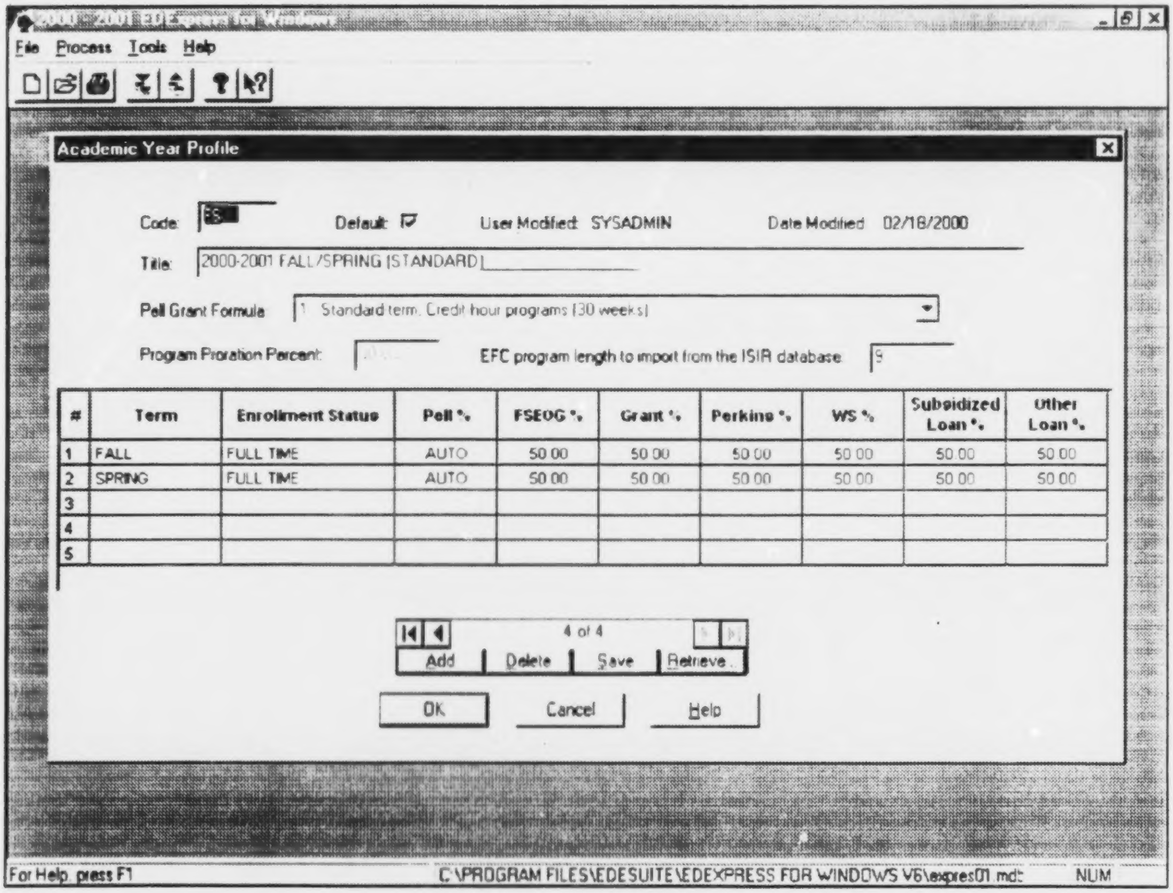
Record updates saved.

OK
Save
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

Examples of Academic Year Profile Records

Pell Grant Formula 1

This AYP record defines a standard term school with two semesters Pell Grants are calculated based on Pell Grant Formula 1 and an assumption of full time enrollment for both terms for all students The system automatically allocates equal distributions of the Pell Grant The Program Proration Percent defaults to 0 00


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Academic Year Profile
4 of 4
Add
Delete
Save
Retrieve...
OK
Cancel
Help

Code: FS
Default: ☑
User Modified: SYSADMIN
Date Modified: 02/18/2000
Title: 2000-2001 FALL/SPRING (STANDARD)
Pell Grant Formula: 1 Standard term, Credit hour programs (30 weeks)
Program Proration Percent: [illegible]
EFC program length to import from the ISIR database: 9

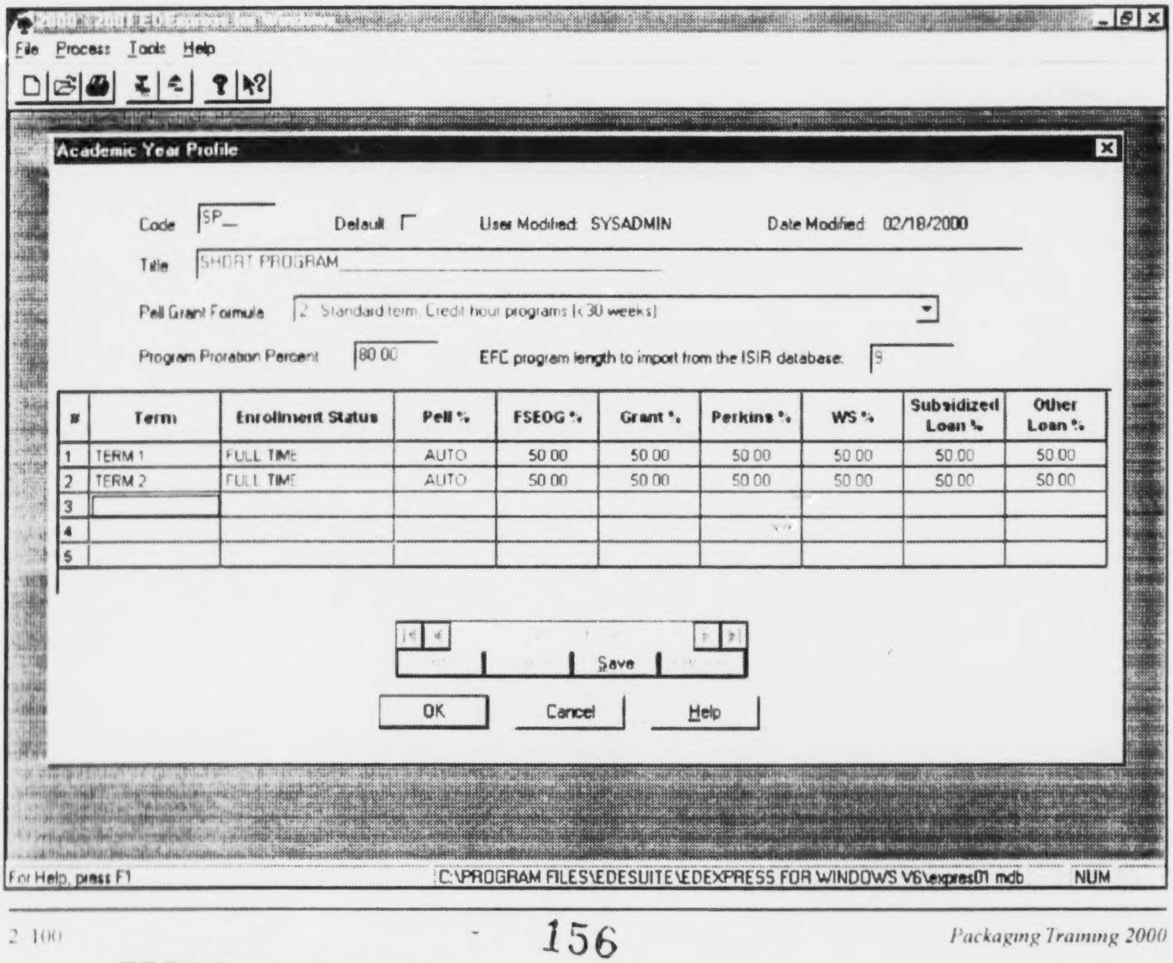
#	Term	Enrollment Status	Pell %	FSEOG %	Grant %	Perkins %	WS %	Subsidized Loan %	Other Loan %
1	FALL	FULL TIME	AUTO	50 00	50 00	50 00	50 00	50 00	50 00
2	SPRING	FULL TIME	AUTO	50 00	50 00	50 00	50 00	50 00	50 00
3									
4									
5									

For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

Pell Grant Formula 2

The Pell Grant Formula is 2, so the system automatically allocates equal distributions of the Pell Grant between the two terms. The Program Proration Percent equals 80.00% (24 weeks/30 weeks = 80.00%)

This AYP record defines a standard term school with an academic year of 24 weeks.



Code: SP
Default ☐
User Modified: SYSADMIN
Date Modified: 02/18/2000
Title: SHORT PROGRAM
Pell Grant Formula: 2 Standard term, Credit hour programs (<30 weeks)
Program Proration Percent: 80.00
EFC program length to import from the ISIR database: 9

#	Term	Enrollment Status	Pell %	FSEOG %	Grant %	Perkins %	WS %	Subsidized Loan %	Other Loan %
1	TERM 1	FULL TIME	AUTO	50.00	50.00	50.00	50.00	50.00	50.00
2	TERM 2	FULL TIME	AUTO	50.00	50.00	50.00	50.00	50.00	50.00
3									
4									
5									

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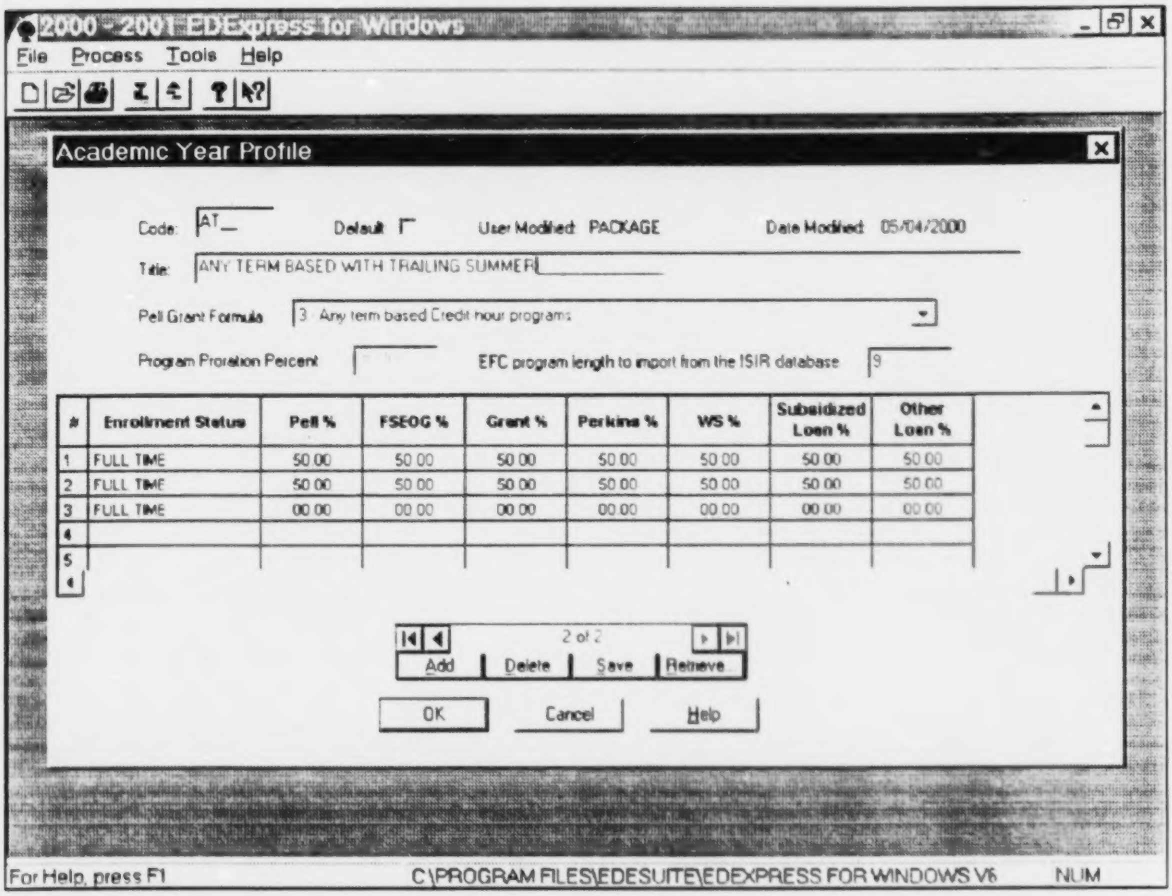
Pell Grant Formula 3 or 6

This AYP record defines a Formula 1 school whose academic year includes a trailing summer term

Because the Pell Grant Formula is 3, the Program Proration Percent defaults to 0.00


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Academic Year Profile
Add
Delete
Save
Retrieve
OK
Cancel
Help

Code: AT_ Default ☐ User Modified: PACKAGE Date Modified: 05/04/2000

Title: ANY TERM BASED WITH TRAILING SUMMER

Pell Grant Formula: 3 - Any term based Credit hour programs

Program Proration Percent:

EFC program length to import from the ISIR database: 9

#	Enrollment Status	Pell %	FSEOG %	Grant %	Perkins %	WS %	Subsidized Loan %	Other Loan %
1	FULL TIME	50.00	50.00	50.00	50.00	50.00	50.00	50.00
2	FULL TIME	50.00	50.00	50.00	50.00	50.00	50.00	50.00
3	FULL TIME	00.00	00.00	00.00	00.00	00.00	00.00	00.00
4								
5								

2 of 2

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6 NUM

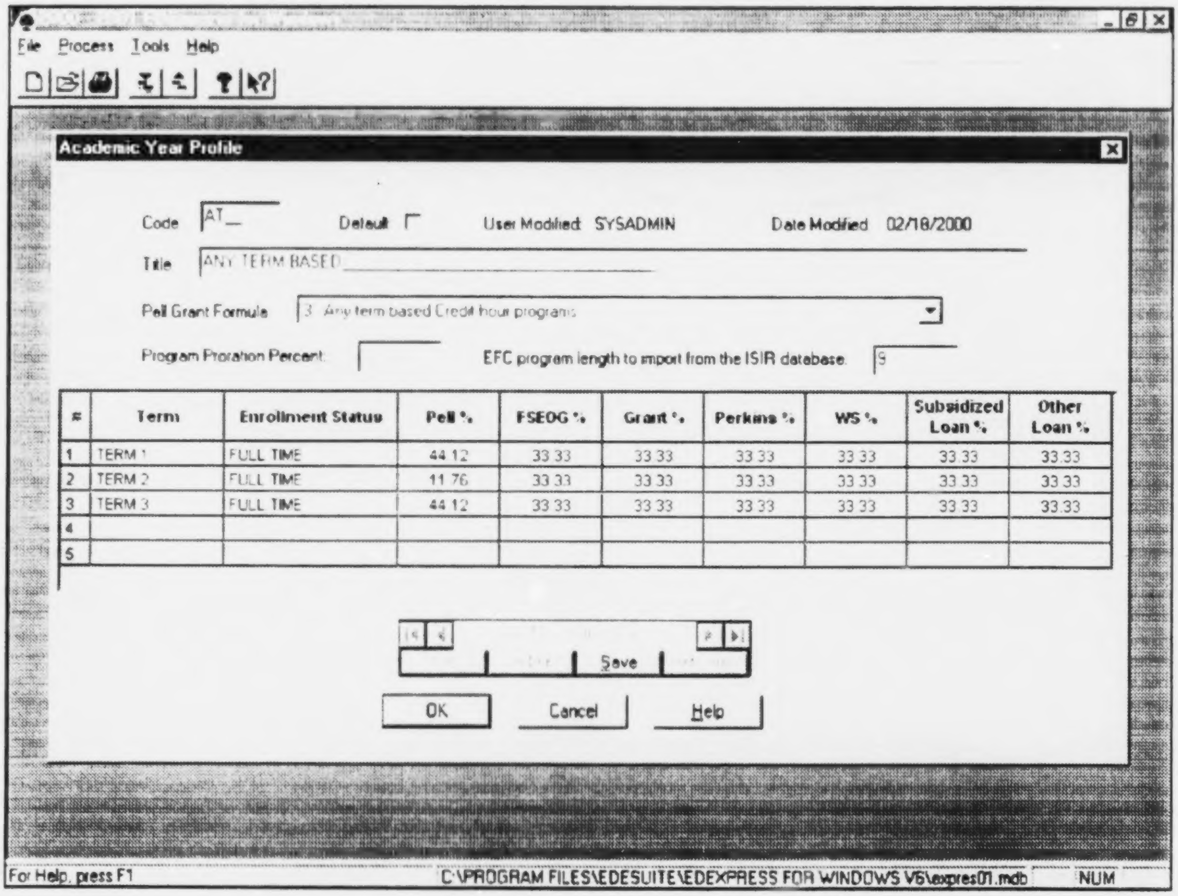
The Pell % for each term is calculated based on the number of weeks in each term

Term 1
15 weeks/34 weeks = 44.12%

Term 2
4 weeks/34 weeks = 11.76%

Term 3
15 weeks/34 weeks = 44.12%

The AYP would be similar if defining a correspondence study, term-based program (Pell Grant Formula 6)



Code: AT
Default ☐
User Modified: SYSADMIN
Date Modified: 02/18/2000
Title: ANY TERM BASED
Pell Grant Formula: 3 Any term based Credit hour programs
Program Proration Percent:
EFC program length to import from the ISIR database: 9

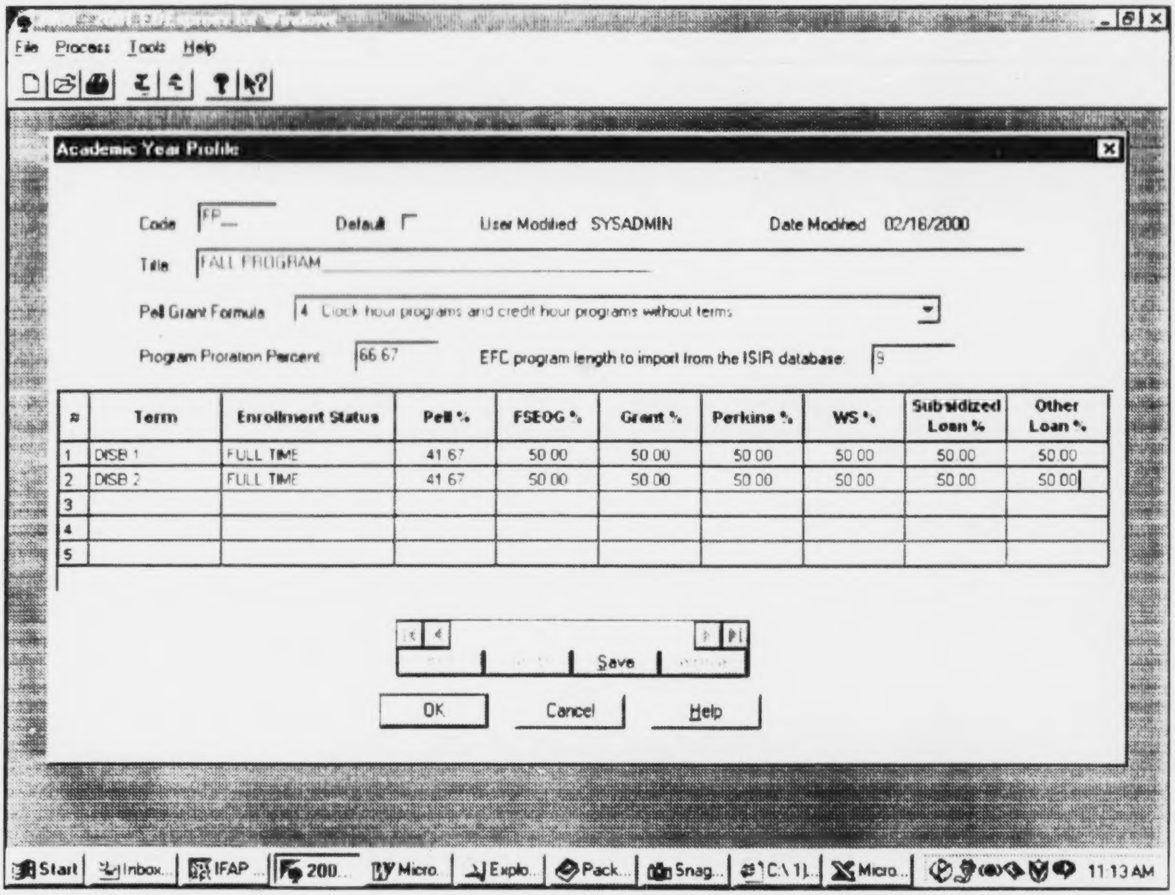
#	Term	Enrollment Status	Pell %	FSEOG %	Grant %	Perkins %	WS %	Subsidized Loan %	Other Loan %
1	TERM 1	FULL TIME	44.12	33.33	33.33	33.33	33.33	33.33	33.33
2	TERM 2	FULL TIME	11.76	33.33	33.33	33.33	33.33	33.33	33.33
3	TERM 3	FULL TIME	44.12	33.33	33.33	33.33	33.33	33.33	33.33
4									
5									

For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

Pell Grant Formula 4 or 5

This AYP record defines a 750-hour clock hour, 20 week program for a school that defines its academic year as 900 clock hours and 30 weeks

Because Pell Grant Formula 4 is used, both the Program Proration Percent and the Pell % must be calculated and entered


File Process Tools Help
Academic Year Profile
OK
Cancel
Help
Save
Start
Inbox...
IFAP...
200...
Micro...
Explo...
Pack...
Snag...
C:\1)...
Micro...
11:13 AM

Code FP

Default ☐

User Modified SYSADMIN

Date Modified 02/18/2000

Title FALL PROGRAM

Pell Grant Formula 4 Clock hour programs and credit hour programs without terms

Program Proration Percent 66.67

EFC program length to import from the ISIR database 9

#	Term	Enrollment Status	Pell %	FSEOG %	Grant %	Perkins %	WS %	Subsidized Loan %	Other Loan %
1	DISB 1	FULL TIME	41.67	50.00	50.00	50.00	50.00	50.00	50.00
2	DISB 2	FULL TIME	41.67	50.00	50.00	50.00	50.00	50.00	50.00
3									
4									
5									

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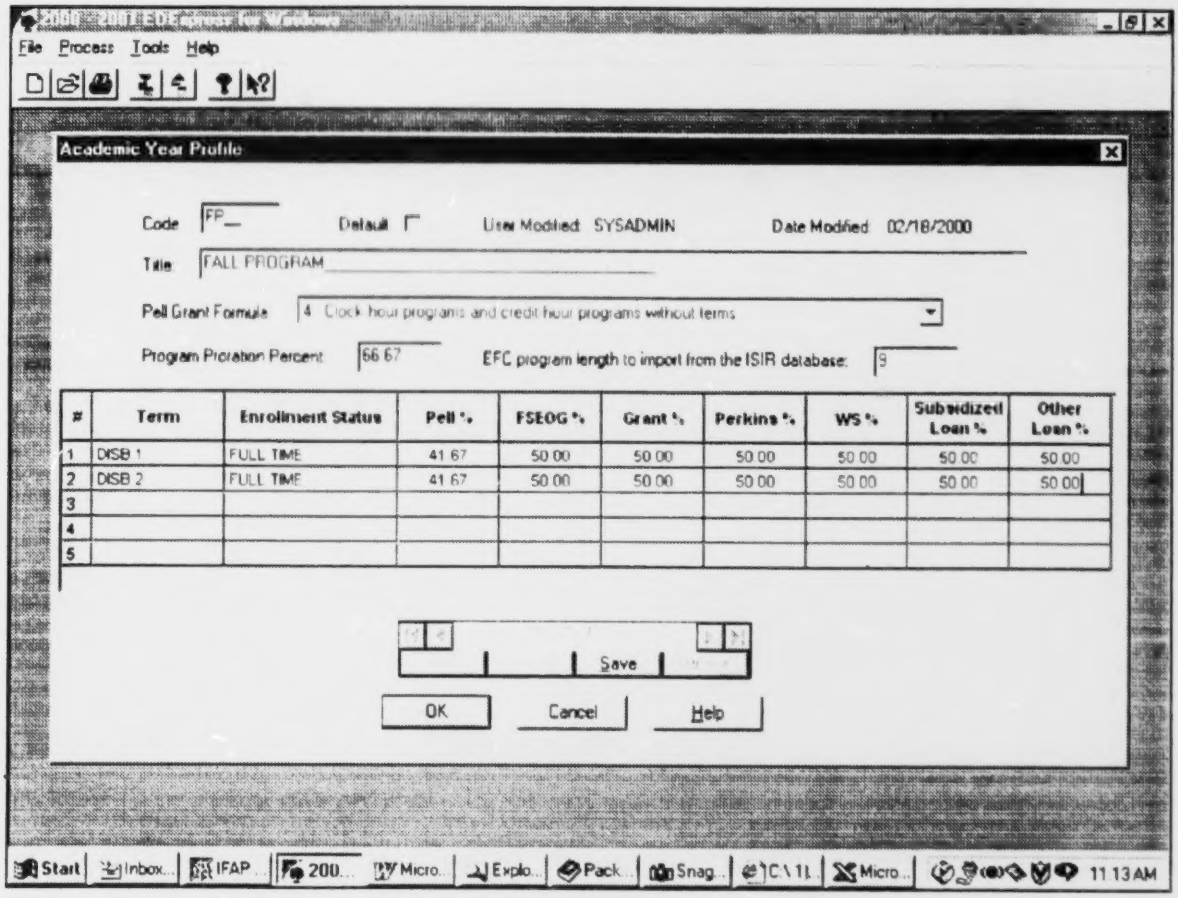
The Program Proration Percent is calculated as follows

20 weeks/30 weeks = 66 67%

The Pell % is calculated as follows

375 clock hours per term/900 clock hours = 41 67%

The AYP would be similar if defining a correspondence study, non term-based program (Pell Grant Formula 5)


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Academic Year Profile
Save
OK
Cancel
Help
Start
Inbox...
IFAP...
200...
Micro...
Explo...
Pack...
Snag...
C:\1...
Micro...
11 13 AM

Code FP

Default ☐

User Modified SYSADMIN

Date Modified 02/18/2000

Title FALL PROGRAM

Pell Grant Formula 4 Clock hour programs and credit hour programs without terms

Program Proration Percent 66 67

EFC program length to import from the ISIR database: 9

#	Term	Enrollment Status	Pell %	FSEOG %	Grant %	Perkins %	WS %	Subsidized Loan %	Other Loan %
1	DISB 1	FULL TIME	41 67	50 00	50 00	50 00	50 00	50 00	50 00
2	DISB 2	FULL TIME	41 67	50 00	50 00	50 00	50 00	50 00	50 00
3									
4									
5									

Budgets

In Budgets Setup, you define specific cost of attendance budgets for various student populations at your school. Then, using a query (created in the Packaging module) to identify a specific student population, you can electronically assign the corresponding budget to all members or subsets of the entire population in one step.

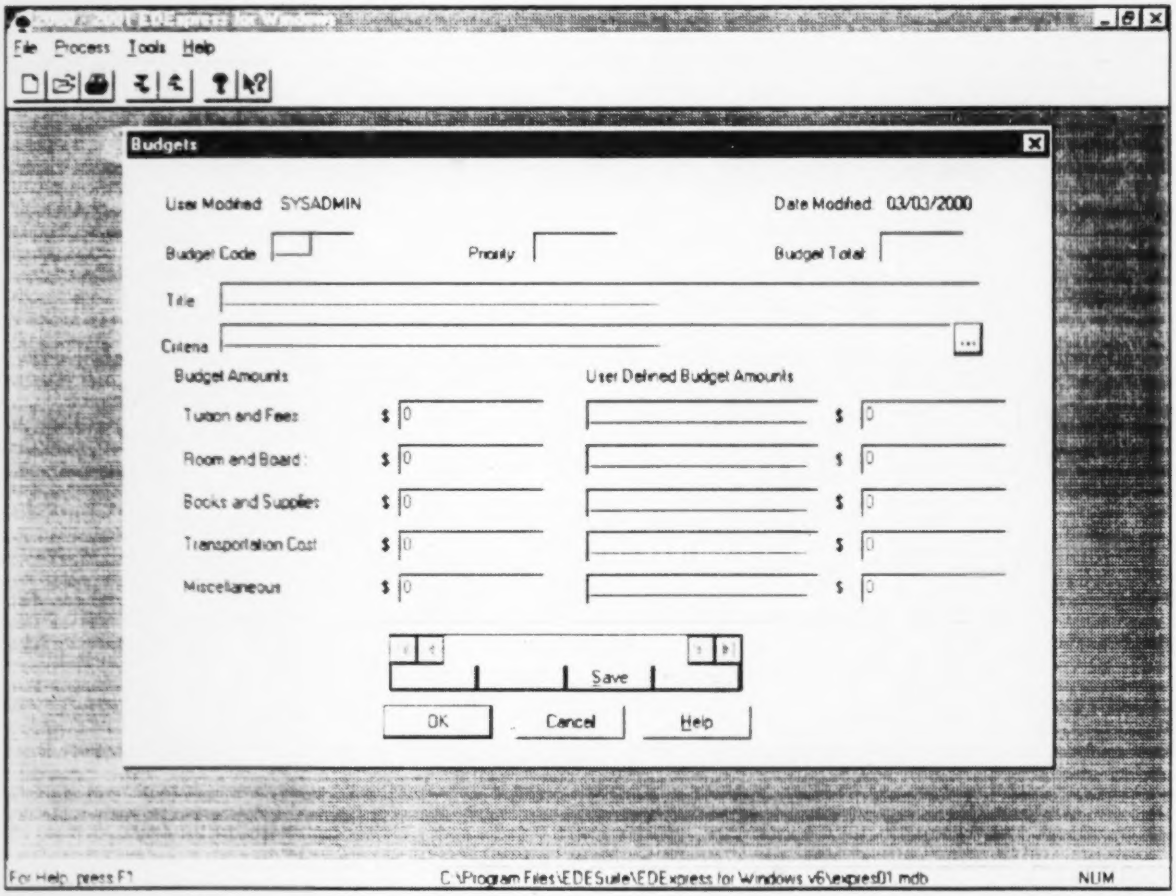
Before you enter data into the software, you must determine the criteria needed to identify the different populations. You might base your population criteria on a single variable, such as grade classification (undergraduate versus graduate), residency (in state versus out of state), housing status (on campus versus off campus), or on some combination of these variables.

You also need to determine what components to include in each educational cost of attendance budget you define for specific student populations. These budget components are those charges and allowances established by your school for attendance for the academic year. Generally, they include tuition and fees, allowances for room and board, books and supplies, an allowance for computer expenses, transportation and miscellaneous expenses, child care, dependent care, and certain disability-related expenses.

[Slide 2-23]

For each budget you create, you define:

- Budget Code
- Priority
- Title
- Criteria
- Budget Amounts
- User-Defined Budget Amounts


EDExpress for Windows
File
Process
Tools
Help
Budgets
Budget Code
Priority
Budget Total
Title
Criteria
...
Budget Amounts
User Defined Budget Amounts
Save
OK
Cancel
Help
For Help, press F1
NUM

User Modified: SYSADMIN

Date Modified: 03/03/2000

Tuition and Fees	$ 0		$ 0
Room and Board	$ 0		$ 0
Books and Supplies	$ 0		$ 0
Transportation Cost	$ 0		$ 0
Miscellaneous	$ 0		$ 0

C:\Program Files\EDESuite\EDExpress for Windows v6\expres01.mdb

Budget Code

The unique code you select identifies the budget. This system-required code can consist of any combination of up to four alphanumeric characters. Both the budget code and the budget total appear on the student's packaging record. Once a budget code is saved to a student's packaging record, the budget code cannot be changed.

Priority

This required numeric field (1-999) indicates the order that the budget database is searched. The first budget for which the student meets the selection criteria is assigned to the student's packaging record.

Title

This field is required, so enter a descriptive title for the budget. The title can consist of up to 50 valid keyboard characters, except the pipe symbol (|). When space is available, the title prints on reports and displays on screens. You cannot change the title once a student packaging record has been assigned to the corresponding budget.

Criteria

This optional field identifies a query you create in the Packaging module to specify which student population should be assigned this budget. The ellipsis button (...) displays the list of titles you created in the Query function. To establish a budget without using Selection Criteria, skip this field. If you change your mind, you can go back and update the field, as long as no student packaging records have been assigned to this budget.

Budget Amounts

This field includes the budget amount you assign to a standard budget component (tuition and fees, room and board, books and supplies, and transportation) you want to include. Each of the four standard budget components has a corresponding budget amount field. In addition, a Miscellaneous field is available for you to include any items not described by the other categories. Valid amounts are 0 to 99999.

|Slide 2-26|

User-Defined Budget Amounts

In addition to the standard budget components, you may include up to 5 more user-defined components and corresponding amounts. For example, you might define a budget component for special fees or for computer expenses.

For each, you must enter a distinct title (up to 25 alphanumeric characters) and an amount (00000 to 99999).

Tips about Budgets

- The software automatically calculates the budget total based on the amounts you enter for the budget components.
- Create as many budgets as needed for your student populations, and prioritize budgets as they apply from the most specific to the most general student populations.
- Group budgets by category. Then, assign a range of budget priority numbers larger than the number of budgets in the category. If you need to add/insert more budgets, you will not have to sequence the priority numbers of existing budgets.
- When importing ISIR data into the Packaging database to create student packaging records, you can have EDExpress automatically allocate budgets based on the criteria (queries) and priority numbers assigned to each budget. However, if working with a large ISIR file, a quicker method is the Process/Add Budget function.
- If you set up only one budget in the database, that budget becomes the default for all student packaging records created.
- At the student packaging record level, you can override the default budget assigned and make changes at any time, even after the student record has been packaged.
- You also can modify the amounts of each component of a student's budget at any time.
- Packaging in EDExpress does not automatically adjust budgets for different enrollment statuses. If budget amounts need to be adjusted for a group of students, create a query that identifies students with a certain enrollment status and use the multiple entry feature of the Packaging Module to assign the correct budget code to those students. Or use multiple entry to enter a group of individual Social Security Numbers for student records that should be assigned the same budget code.
- If you create a new budget and want to assign it to existing records in the packaging database, you must manually add the budget to each appropriate student record.
- Once a particular budget has been assigned to a packaging record, you no longer can modify that budget in Setup.

[Slide 2-27]

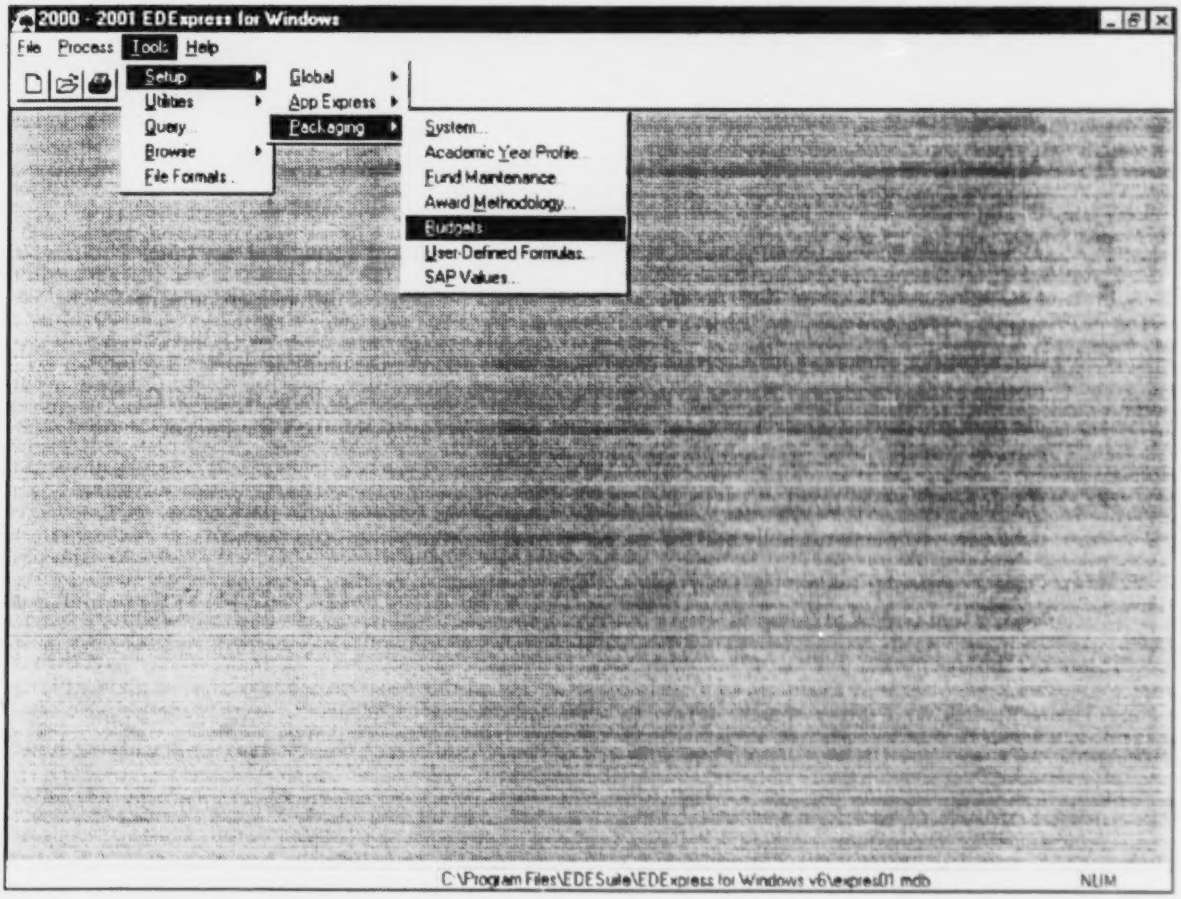
Creating a Budget

To create a new budget record

*Select **Tools/Setup/Packaging/Budget** from the menu bar*

Let's see how the information from a completed Cost of Attendance Budget Worksheet is transferred to the software.

In this example, the budget is for first-year, music majors who live on campus. (Refer to the sample Cost of Attendance Budget Worksheet on the following page.)


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Setup
Utilities
Query...
Browse
File Formats...
Global
App Express
Packaging
System...
Academic Year Profile...
Fund Maintenance...
Award Methodology...
Budgets...
User-Defined Formulas...
SAP Values...
C:\Program Files\EDESuite\EDExpress for Windows v6\expres01.mdb
NUM

Cost of Attendance Budget Worksheet

1. Enter the Budget Code (Up to four alphanumeric characters).	1 _ _ _
2. Establish a priority number (0-999). If a student is selected for more than one budget, the highest priority budget is applied	1 _ _

3. Enter up to fifty (50) characters to create a free-form title.

1st Yr, Music Majors, On Campus

4. Select a Query that is used to select the group of students who should receive this budget (optional).

1st Yr, Music Majors, On Campus

Budget Component	Budget Amount	User Defined Budget Component	Budget Amount
Tuition & Fees	6,500	Loan Fees	80
Room & Board	4,300	Computer Expenses	1,500
Books & Supplies	800	Music Fees	650
Transportation	1,000		
Miscellaneous	900		

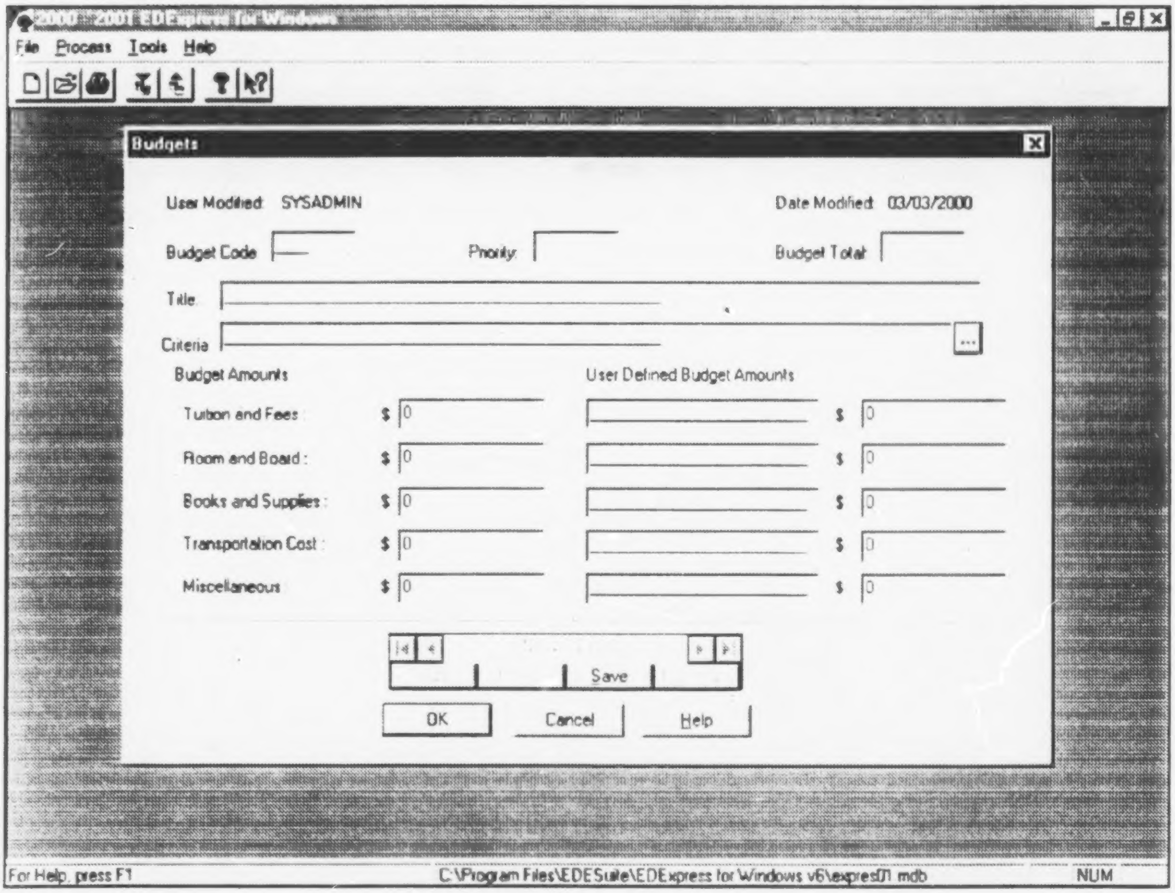
Total	15,730

The Budget Dialog box displays

*Select **Add** to enter a new record*

If this is the first budget record created in the database, EDExpress automatically opens a new budget record screen

Tip: Notice that the Budget Total defaults to $0


2000 - 2001 EDExpress for Windows
File Process Tools Help
Budgets
Save
OK
Cancel
Help

User Modified: SYSADMIN
Date Modified: 03/03/2000
Budget Code:
Priority:
Budget Total:
Title:
Criteria:

Budget Amounts		User Defined Budget Amounts	
Tuition and Fees:	$ 0		$ 0
Room and Board:	$ 0		$ 0
Books and Supplies:	$ 0		$ 0
Transportation Cost:	$ 0		$ 0
Miscellaneous	$ 0		$ 0

For Help, press F1
C:\Program Files\EDESuite\EDExpress for Windows v6\expres01.mdb
NUM

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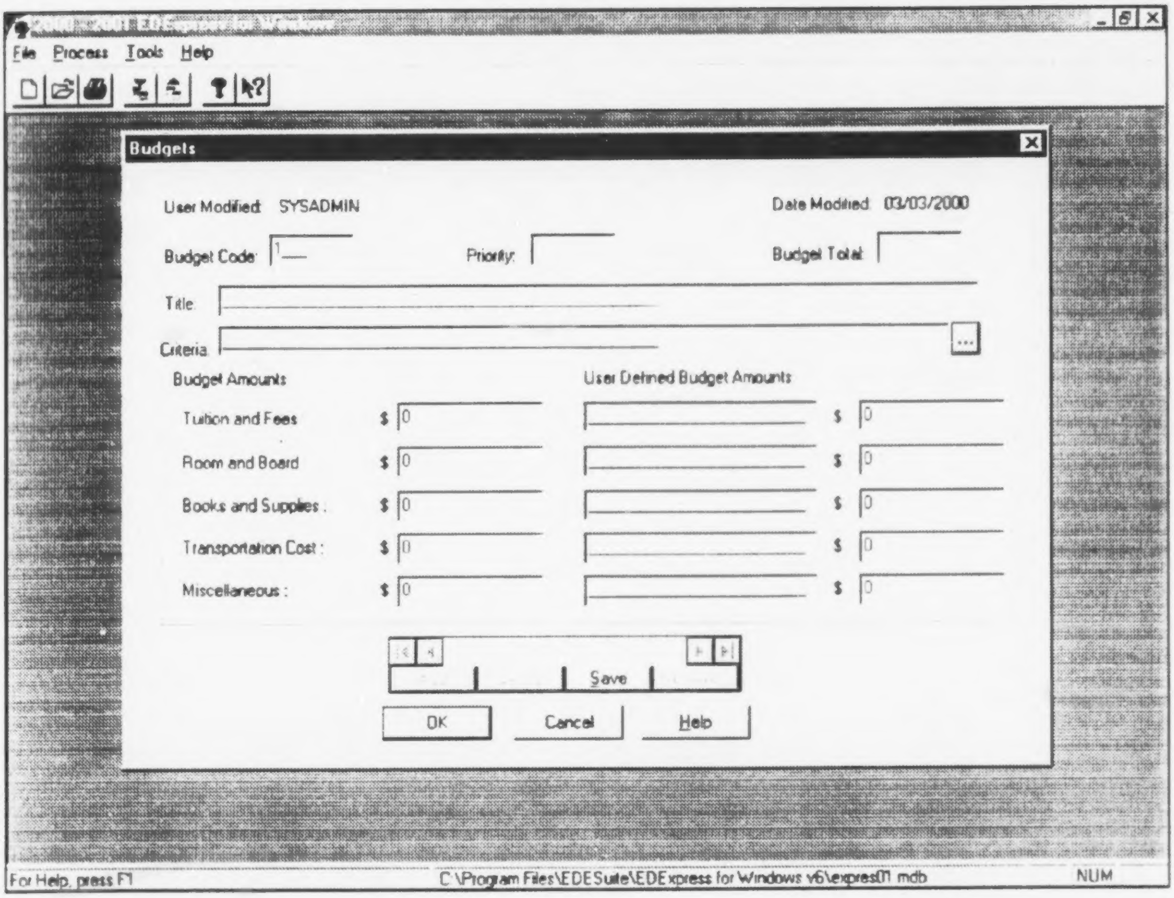
Enter up to 4 alphanumeric characters for the **Budget Code**, the unique identifier of this budget record



User Modified: SYSADMIN
Date Modified: 03/03/2000
Budget Code: 1
Priority:
Budget Total:
Title:
Criteria:

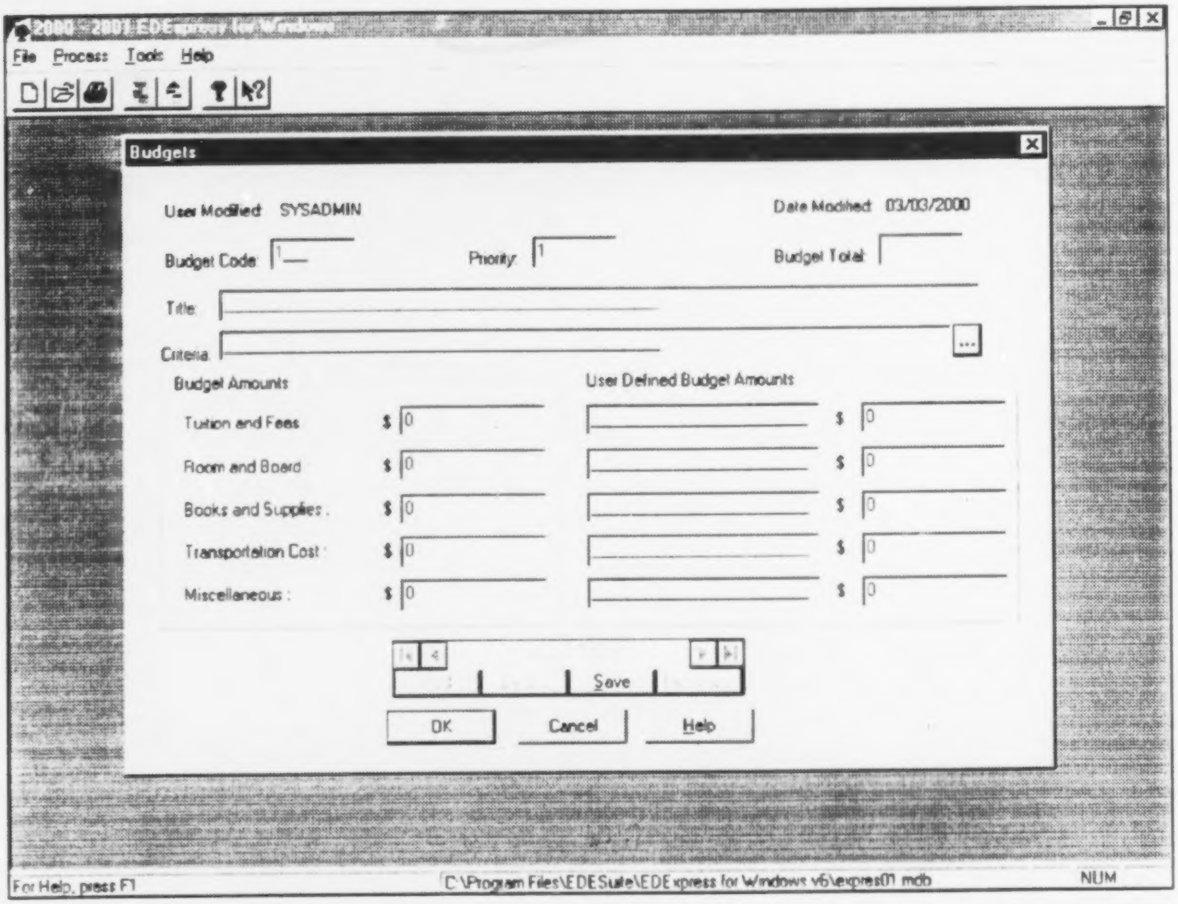
Budget Amounts		User Defined Budget Amounts	
Tuition and Fees	$ 0		$ 0
Room and Board	$ 0		$ 0
Books and Supplies :	$ 0		$ 0
Transportation Cost :	$ 0		$ 0
Miscellaneous :	$ 0		$ 0

For Help, press F1
C:\Program Files\EDESuite\EDExpress for Windows v6\expres01.mdb
NUM

Enter the **Priority Code**. Valid values are 1-999

Tip: Remember to prioritize your budget structure to move from the most specific (smallest) group of students to the most general (largest).

Priority 1 indicates the highest priority, while Priority 999 indicates the lowest.


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Budgets
Save
OK
Cancel
Help
NUM

User Modified: SYSADMIN

Date Modified: 03/03/2000

Budget Code: 1

Priority: 1

Budget Total:

Title:

Criteria:

Budget Amounts		User Defined Budget Amounts	
Tuition and Fees	$ 0		$ 0
Room and Board	$ 0		$ 0
Books and Supplies :	$ 0		$ 0
Transportation Cost :	$ 0		$ 0
Miscellaneous :	$ 0		$ 0

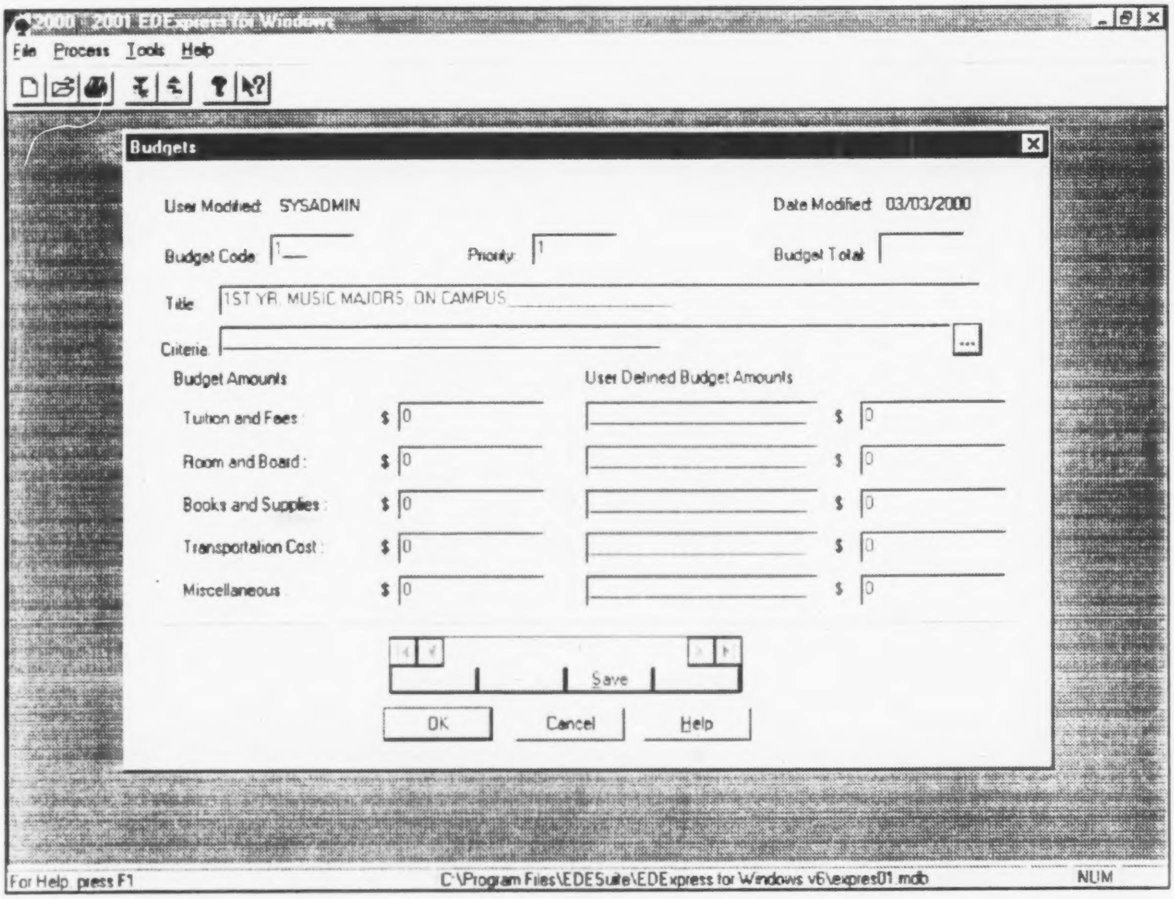
For Help, press F1

C:\Program Files\EDESuite\EDExpress for Windows v6\expres01.mdb

Tip: *To ensure that all packaging records can be automatically assigned a budget, create one budget code that applies to the general student population. Assign a priority of 999, and don't select Criteria (query).*

*Enter a descriptive **Title** (up to 50 characters) to identify the students to receive this budget.*

*Select **Criteria** to specify students for this budget. Either enter the query name or click the ellipsis button next to the field.*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Budgets

User Modified: SYSADMIN

Date Modified: 03/03/2000

Budget Code: 1

Priority: 1

Budget Total:

Title: 1ST YR. MUSIC MAJORS, ON CAMPUS

Criteria:

Budget Amounts		User Defined Budget Amounts	
Tuition and Fees:	$ 0		$ 0
Room and Board:	$ 0		$ 0
Books and Supplies:	$ 0		$ 0
Transportation Cost:	$ 0		$ 0
Miscellaneous:	$ 0		$ 0

Save
OK
Cancel
Help
For Help, press F1
C:\Program Files\EDESuite\EDExpress for Windows v6\expres01.mdb
NUM

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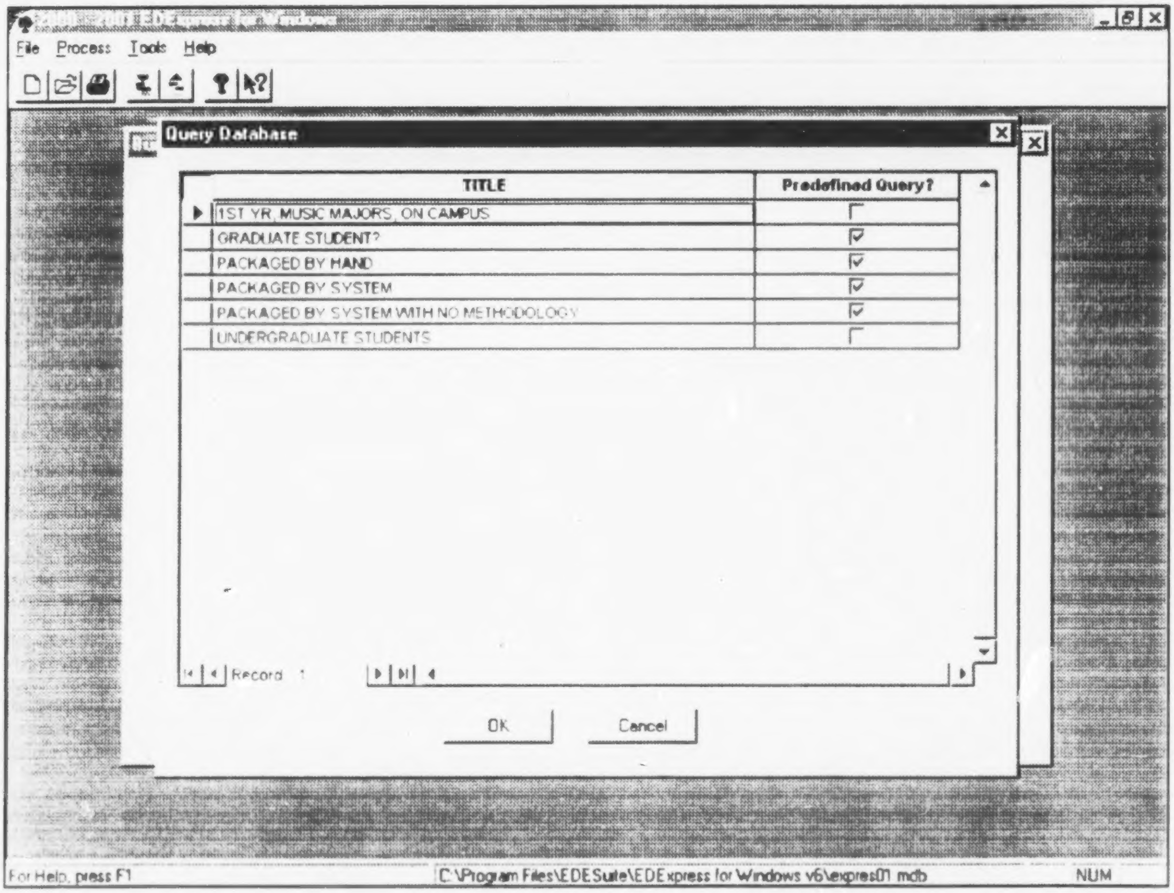
Click the ***ellipsis button*** *to display the Query Database dialog box. Select the query you want by highlighting the query name*

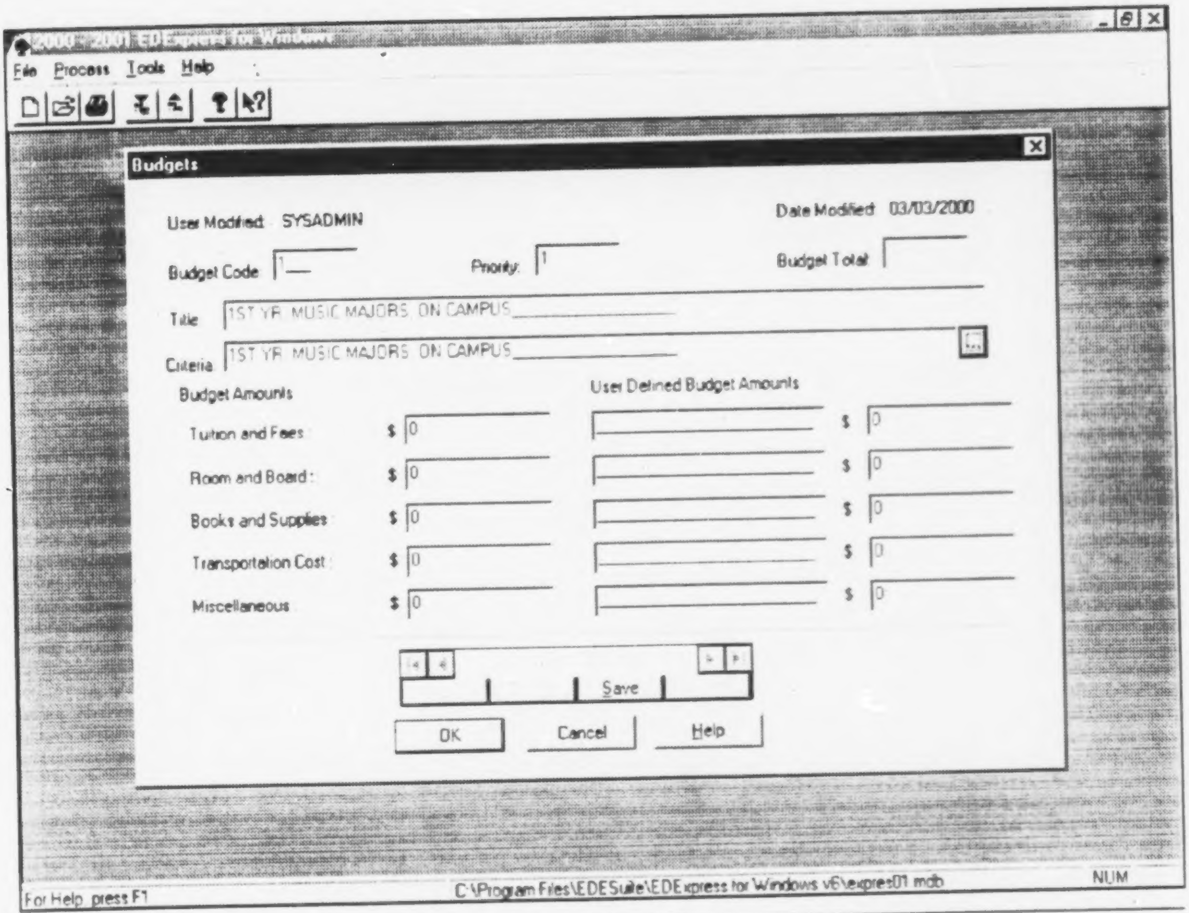
In this example, the query name is the same as the Title, 1st Yr, On Campus, Music Majors.


2000-2001 EDExpress for Windows
File
Process
Tools
Help
Query Database
Record 1
OK
Cancel
For Help, press F1
NUM

TITLE	Predefined Query?
1ST YR, MUSIC MAJORS, ON CAMPUS	☐
GRADUATE STUDENT?	☑
PACKAGED BY HAND	☑
PACKAGED BY SYSTEM	☑
PACKAGED BY SYSTEM WITH NO METHODOLOGY	☑
UNDERGRADUATE STUDENTS	☐

C:\Program Files\EDESuite\EDExpress for Windows v6\expres01.mdb

The title of the query you select displays in the Criteria field


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Budgets
OK
Cancel
Help
Save
For Help, press F1
NUM

User Modified: SYSADMIN

Date Modified: 03/03/2000

Budget Code: 1

Priority: 1

Budget Total:

Title: 1ST YR. MUSIC MAJORS, ON CAMPUS

Criteria: 1ST YR. MUSIC MAJORS, ON CAMPUS

Budget Amounts

Tuition and Fees: $ 0

Room and Board: $ 0

Books and Supplies: $ 0

Transportation Cost: $ 0

Miscellaneous: $ 0

User Defined Budget Amounts

$ 0

$ 0

$ 0

$ 0

$ 0

C:\Program Files\EDESuite\EDExpress for Windows v6\expres01.mdb

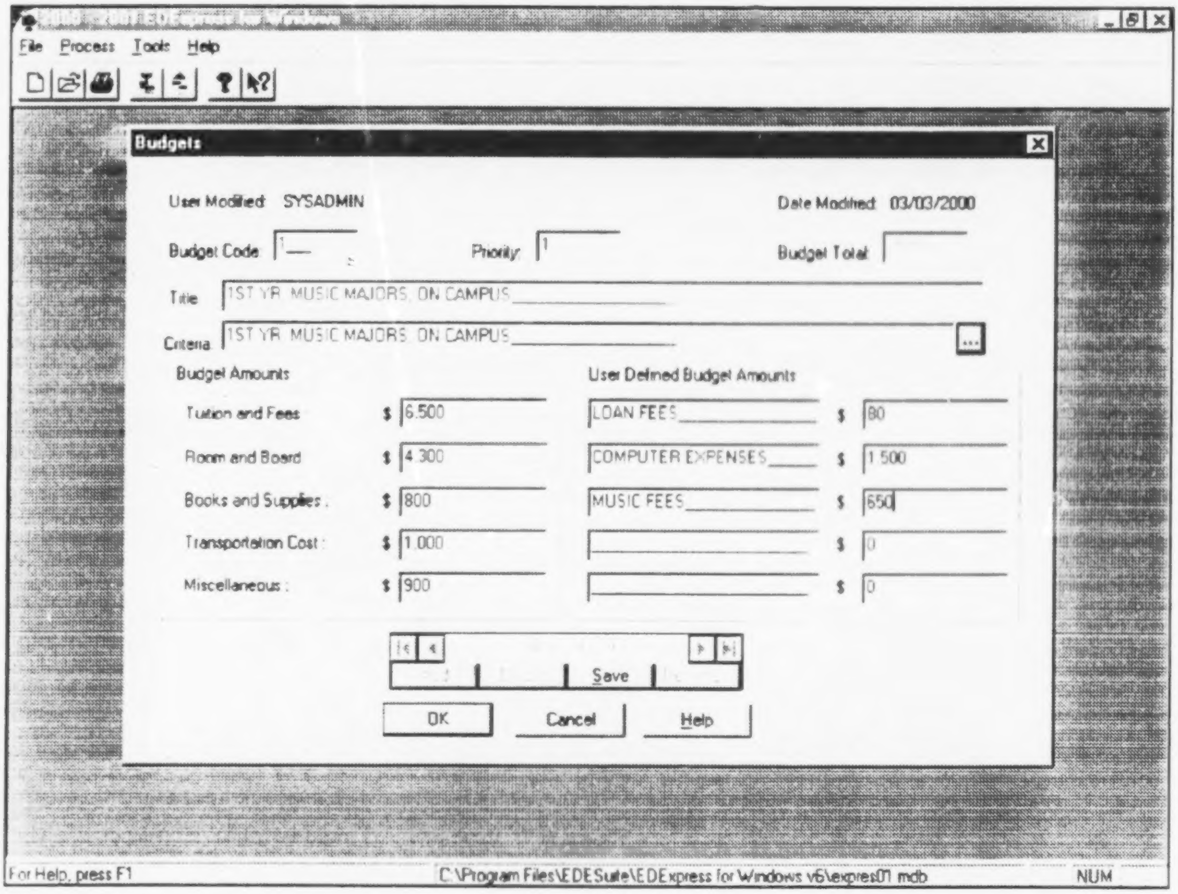
Enter the ***Budget Amount*** *that corresponds to each component*

If ***User-defined Budget Amounts*** *are included, enter a title and amount for each user-defined component*

The Budget Total field updates as budget amounts are entered or changed

To save the record click ***Save***

In this example, we added user-defined components for loan fees, computer expenses, and music fees



User Modified: SYSADMIN

Date Modified: 03/03/2000

Budget Code: 1

Priority: 1

Budget Total:

Title: 1ST YR. MUSIC MAJORS, ON CAMPUS

Criteria: 1ST YR. MUSIC MAJORS, ON CAMPUS

Budget Amounts		User Defined Budget Amounts	
Tuition and Fees	$ 6,500	LOAN FEES	$ 80
Room and Board	$ 4,300	COMPUTER EXPENSES	$ 1,500
Books and Supplies :	$ 800	MUSIC FEES	$ 650
Transportation Cost :	$ 1,000		$ 0
Miscellaneous :	$ 900		$ 0

For Help, press F1

C:\Program Files\EDESuite\EDExpress for Windows v6\expres01.mdb

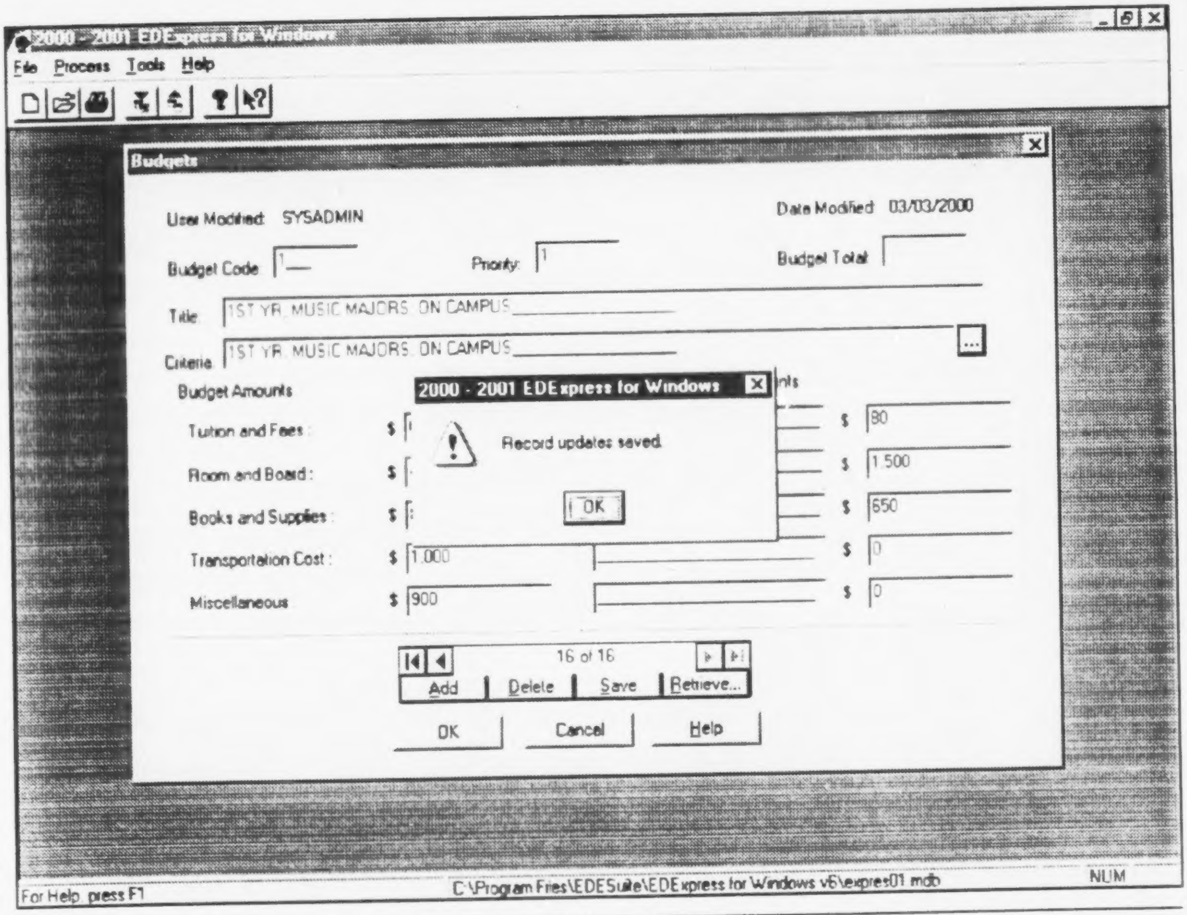
The Packaging System allows you to batch add budgets to student records

A Records Updates Saved dialog box displays

*Click **OK***

*Click **Add** to continue entering additional budgets*

*Otherwise, click **OK** again or **Cancel** to exit*



2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Budgets
2000 - 2001 EDExpress for Windows
OK
16 of 16
Add
Delete
Save
Retrieve...
OK
Cancel
Help
For Help, press F1
NUM

User Modified: SYSADMIN

Date Modified: 03/03/2000

Budget Code: 1

Priority: 1

Budget Total:

Title: 1ST YR. MUSIC MAJORS, ON CAMPUS

Criteria: 1ST YR. MUSIC MAJORS, ON CAMPUS

Budget Amounts

Tuition and Fees:	$	$ 80
Room and Board:	$	$ 1,500
Books and Supplies:	$	$ 650
Transportation Cost:	$ 1,000	$ 0
Miscellaneous	$ 900	$ 0

Record updates saved.

C:\Program Files\EDESuite\EDExpress for Windows v6\expres01.mdb

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This is a complete budget record

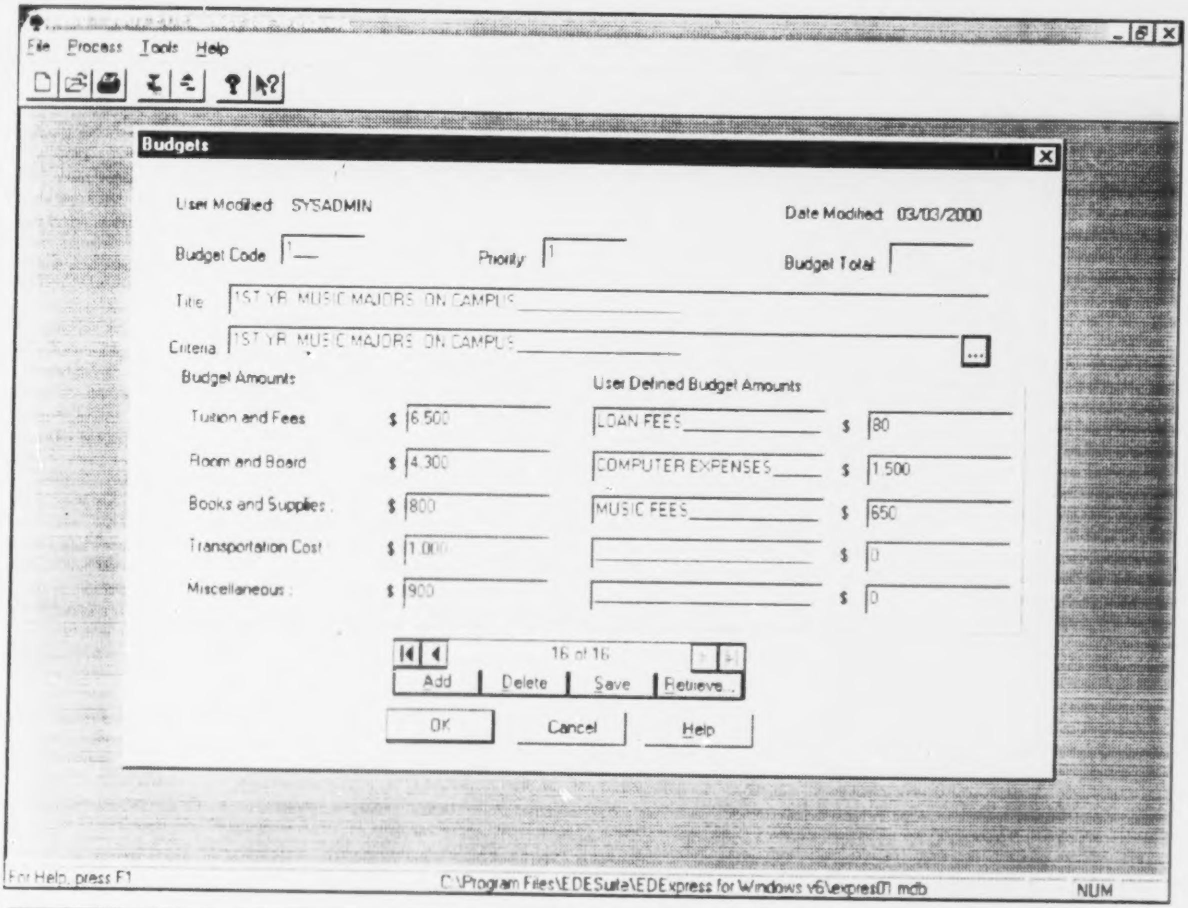
This budget will be applied to all 1st year dependent students who live on campus and who are music majors. Because the student population to which this budget applies is very specific, high priority is appropriate.

Tip: *Before entering data into the software, identify all budgets you need, complete a Cost of Attendance Budget Worksheet for each, and put them in priority order.*

When you modify the priority of existing budget records, the system re-sequences their order of priority. However, student packaging records already assigned budgets won't be impacted by this re-sequencing.

When entering budget records, you can cancel your entries by clicking Cancel to close the Budget dialog box.

Use Online Help to see examples of various budget setups.



User Modified SYSADMIN

Date Modified 03/03/2000

Budget Code 1

Priority 1

Budget Total

Title 1ST YR. MUSIC MAJORS, ON CAMPUS

Criteria 1ST YR. MUSIC MAJORS, ON CAMPUS

Budget Amounts		User Defined Budget Amounts	
Tuition and Fees	$ 6,500	LOAN FEES	$ 80
Room and Board	$ 4,300	COMPUTER EXPENSES	$ 1,500
Books and Supplies :	$ 800	MUSIC FEES	$ 650
Transportation Cost	$ 1,000		$ 0
Miscellaneous :	$ 900		$ 0

C:\Program Files\EDESuite\EDExpress for Windows v6\expres01.mdb

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Apply What You Learned

This exercise provides practice in developing customized cost of attendance budgets for use in packaging.

Think of four student populations on your own campus that will be packaged. For each, consider the following:

- Academic Year Profile
- Tuition
- Housing
- Special Fees
- Priority (general population versus specific population)
- Is a query needed to identify the student population associated with the particular budget?

1. For each of the four groups, complete one of the Cost of Attendance Budget Worksheets provided on the four pages that follow.
2. If necessary, complete corresponding query worksheets to identify each student population associated with the budgets you defined (four blank Query Worksheets follow the Cost of Attendance Budget Worksheets). Refer to page A-3 for a listing of available data fields in the Packaging database.

Cost of Attendance Budget Worksheet

1. Enter the Budget Code (Up to four alphanumeric characters).	__ __ __ __
2. Establish a priority number (0-999). If a student is selected for more than one budget, the highest priority budget is applied	__ __ __

3. Enter up to fifty (50) characters to create a free-form title.

4. Select a Query that is used to select the group of students who should receive this budget (optional).

Budget Component	Budget Amount	User Defined Budget Component	Budget Amount
Tuition & Fees			
Room & Board			
Books & Supplies			
Transportation			
Miscellaneous			

Total	

Cost of Attendance Budget Worksheet

1. Enter the Budget Code (Up to four alphanumeric characters). ___ ___ ___ ___

2. Establish a priority number (0-999). If a student is selected for more than one budget, the highest priority budget is applied ___ ___ ___

3. Enter up to fifty (50) characters to create a free-form title.

4. Select a Query that is used to select the group of students who should receive this budget (optional).

Budget Component	Budget Amount	User Defined Budget Component	Budget Amount
Tuition & Fees			
Room & Board			
Books & Supplies			
Transportation			
Miscellaneous			

Total	

Cost of Attendance Budget Worksheet

1. Enter the Budget Code (Up to four alphanumeric characters).	__ __ __ __
2. Establish a priority number (0-999). If a student is selected for more than one budget, the highest priority budget is applied	__ __ __

3. Enter up to fifty (50) characters to create a free-form title.

4. Select a Query that is used to select the group of students who should receive this budget (optional).

Budget Component	Budget Amount	User Defined Budget Component	Budget Amount
Tuition & Fees			
Room & Board			
Books & Supplies			
Transportation			
Miscellaneous			

Total	

Cost of Attendance Budget Worksheet

1. Enter the Budget Code (Up to four alphanumeric characters). ___ ___ ___ ___

2. Establish a priority number (0-999). If a student is selected for more than one budget, the highest priority budget is applied ___ ___ ___

3. Enter up to fifty (50) characters to create a free-form title.

4. Select a Query that is used to select the group of students who should receive this budget (optional).

Budget Component	Budget Amount	User Defined Budget Component	Budget Amount
Tuition & Fees			
Room & Board			
Books & Supplies			
Transportation			
Miscellaneous			

Total	

Query Worksheet

What Task do You Want to Perform?	What Module is Available to Create the Query to Perform this Task?
	☐ Apps ☐ Global ☐ DL ☐ Packaging ☐ Pell

Enter a title for the Query that describes the group of students to be selected:

Data Element	Operators	Value
Enter the data field(s) from the Module indicated above	=, <>, <, >, >=, <=, like, not like	☐ Prompt at Execution (to create a parameter query) ☐ Enter free-form or system-assigned value
	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	

Query Worksheet

What Task do You Want to Perform?	What Module is Available to Create the Query to Perform this Task?
	☐ Apps ☐ Global ☐ DL ☐ Packaging ☐ Pell

Enter a title for the Query that describes the group of students to be selected:

Data Element	Operators	Value
Enter the data field(s) from the Module indicated above	=, <>, <, >, >=, <=, like, not like	☐ Prompt at Execution (to create a parameter query) ☐ Enter free-form or system-assigned value
	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	

Query Worksheet

What Task do You Want to Perform?	What Module is Available to Create the Query to Perform this Task?
	☐ Apps ☐ Global ☐ DL ☐ Packaging ☐ Pell

Enter a title for the Query that describes the group of students to be selected:

Data Element	Operators	Value
Enter the data field(s) from the Module indicated above	=, < >, <, >, > =, < =, like, not like	☐ Prompt at Execution (to create a parameter query) ☐ Enter free-form or system-assigned value
	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	

Query Worksheet

What Task do You Want to Perform?	What Module is Available to Create the Query to Perform this Task?
	☐ Apps ☐ Global ☐ DL ☐ Packaging ☐ Pell

Enter a title for the Query that describes the group of students to be selected:

Data Element	Operators	Value
Enter the data field(s) from the Module indicated above	=, <>, <, >, >=, <=, like, not like	☐ Prompt at Execution (to create a parameter query) ☐ Enter free-form or system-assigned value
	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	

Unit 2—Setup

Lesson 8

Fund Maintenance

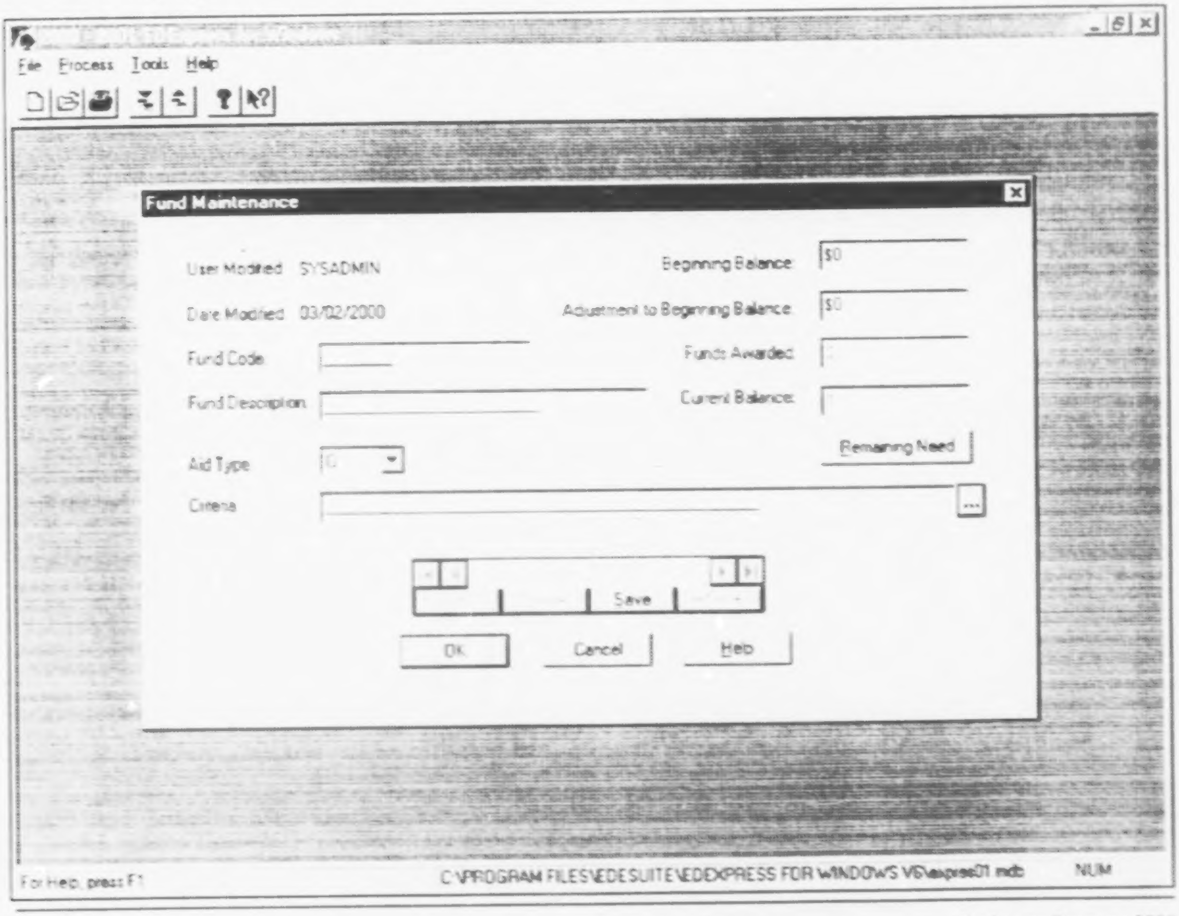
Using the Fund Maintenance function, you create and maintain aid sources (or funds) needed for packaging students. You also can access instant information about total amounts awarded as well as amounts remaining.

Each fund you create represents a discrete financial aid resource. You can add as many funds as needed. In addition to funds for federal student aid programs, you can create funds for institutional, state, and outside programs. For some funds, you also can set awarding parameters based on remaining need.

[Slide 2-29]

For each fund you set up, you need to make decisions about the following fund components and enter the information into the software:

- Fund Code
- Fund Description
- Aid Type
- Beginning Balance
- Adjustment to Beginning Balance
- Remaining Need
- Criteria



User Modified SYSADMIN

Date Modified 03/02/2000

Beginning Balance $0

Adjustment to Beginning Balance $0

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\express01.mdb

File
Process
Tools
Help
Fund Maintenance
Fund Code
Fund Description
Aid Type
Criteria
Funds Awarded
Current Balance
Remaining Need
Save
OK
Cancel
Help
For Help, press F1
NUM

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Fund Code

For each fund you set up, a Fund Code is required and this field cannot be blank. Each fund has a unique code, up to eight alphanumeric characters long. Be sure to assign a code that readily identifies the fund. In most instances, this will be the only fund identifier you see.

Unless you are adding a new code, the field is display only. You cannot modify a fund code after you have added or saved the fund to the database.

Fund Description

Each fund also requires a corresponding Fund Description, up to 25 alphanumeric characters long. This field cannot be left blank.

Aid Type

The field for the Aid Type identifies the aid category of the fund and cannot be blank. Refer to page 2-130 for a complete listing of aid types. The Aid Type field impacts how the fund is packaged. Note that Aid Type codes E, F, K, P, S, W, and U cannot be assigned to more than one fund.

NEW!

Funds created for Federal Work-Study and Other Work-Study are assigned different aid types: W = Federal Work-Study and Y = Other Work-Study.

Beginning Balance

The value in the Beginning Balance field is the initial amount authorized to award from this fund for the upcoming year. This field cannot be blank. Valid balance amounts are 00000000 to 99999999.

Once the fund record is saved, you cannot change the value entered in this field. To make changes, your options are to delete the fund (only if no packaging records have been awarded from it) and start over or to enter a value in the Adjustment to Beginning Value field.

Adjustment to Beginning Balance

The Adjustment to Beginning Balance field contains the running total of adjustments that may need to be made to the fund's Beginning Balance. Adjustments could be due to changes in authorizations, refunds, matches, etc.

Valid amounts are 00000000 to 99999999 and they can be negative values. Generally, when the fund is set up the value entered will be 0, since the field cannot be blank.

Aid Type

Aid Type	Can Apply to More than One Fund Code	Fund	Description
	Yes/No		
E	No	Federal Supplemental Educational Opportunity Grant (FSEOG)	Gift aid.
F	No	Federal Pell Grant	Gift aid. Awarded based on the Pell Grant Formula setup in the AYP.
G	Yes	Grant	Gift aid. Use for any grant or scholarship, other than Pell or FSEOG. Federal grant funds of this type are treated as gift aid.
K	No	Perkins Loan	Self-help.
L	Yes	Other Need-Based Loan	Self-help. In the packaging process, award amounts from this fund are limited to need.
N	Yes	Non-Need Based Loan	Self-help. Award amounts from this fund cannot exceed the budget amount, less other resources.
P	No	PLUS (Parent Loan)	Self-help. Award amounts from this fund cannot exceed the budget amount, less other resources.
O	Yes	Outside Resource	Gift aid or Self-help. Identifies a fund for which you enter an award decision made "outside" the system. Although the fund is considered a resource in the packaging process, it cannot be automatically packaged by the system. Awards from this fund type should be added manually.
S	No	Federal Subsidized Stafford Loan	Self-help. In the packaging process an award amount from the fund with this aid type is subject to statutory annual loan limit amounts based on the student's eligibility.
U	No	Federal Unsubsidized Stafford Loan	Self-help. In the packaging process an award amount from the fund with this aid type is subject to statutory annual loan limit amounts based on the student's eligibility.
W	No	Federal Work-Study	Self-help.
Y	Yes	Other Work-Study	Self-help.

[Slide 2-31]

Remaining Need

This feature allows you to package specific amounts of a fund at different levels of remaining need. For example, after awarding Stafford loans (Sub/Unsubsidized), you can designate how much of an institutional need-based scholarship to award based on the student's remaining need. So, if there is still at least $2,500 or greater remaining need, you can tell the software to award $500, if at least $2,000 to $2,499, award $300, if between $500 and $1,999, award $150, etc.

You can designate up to 6 levels of remaining need and corresponding award amounts. However, this feature pertains only to Aid Type codes E, G, K, L, N, W, and Y. Aid type codes F, O, S, U, and P are excluded.

Criteria

This optional feature, based on a defined query, allows you to specify which students should receive awards from the fund being setup or maintained. The ellipsis ( ) button displays the list of defined queries from which you would select the one you want tied to the fund.

[Slide 2-32]

Tips about Funds

- Schools participating in both Direct Loan and FFELprograms must assign aid types as follows

	Direct Loan	FFEL
Subsidized	S	L
Unsubsidized	U	N
PLUS	P	N

However, because aid types L and N are not tied to federal loan limits, you must create award methodologies and queries based on grade levels and assign fund codes to those methodologies.

- A student record may be awarded the same fund more than once. However, on the award letter, the fund prints only once along with the combined total of the student's awards from the fund.
- Make sure that the Pell fund is created with the aid type F rather than G, otherwise, the fund will not package correctly.

Apply What You Learned

Before the demonstration of how a fund is created in the Packaging database, you'll practice completing a Fund Maintenance Worksheet for an FSEOG fund. A blank worksheet is provided on the page that follows.

In this example, FSEOG is to be awarded only to undergraduate students with an EFC not greater than 500. Therefore, you'll need to associate with the fund a query that selects only this student population.

1. Complete the blank Fund Maintenance Worksheet on the page that follows, using the following criteria:
   - Fund Code = FSEOG
   - Fund Description = Federal SEOG
   - $275,000 is the total amount of your federal authorization (Although in the "real world" you may want to temporarily exceed this amount early on in the awarding process, for the purposes of this exercise have the fund balance match the authorization.)
   - For students whose remaining need is between 1000 and 3500, award $1,000
   - For students whose remaining need is greater than 3500, award $2,000
   - Include Criteria (query)
2. Complete the blank Query Worksheet provided on the page that follows the Fund Maintenance Worksheet. Refer to page A-3 for a listing of available data fields in the Packaging data base.

   Use the following criteria:
   - Undergraduate status is based on the year of study reported on the FASFA

     Year of study data field = College Grade Level

     Year of study valid values = 1, 2, 3, 4, 5, or 6
   - EFC is not greater than 500

     EFC data field = EFC
   - Query Title = Undergraduates, EFC < 501

Note: *You might prefer to query on fields from your institutional database to determine undergraduate status. If so, you could create user-defined fields in the Global database, since all user-defined fields are accessible to all EDExpress modules for various functions including queries. Then, you could import institutional data and query on the user-defined field(s).*

Fund Maintenance Worksheet

1. Enter up to eight characters to create a free-form **Fund Code**.	_ _ _ _ _ _ _ _
2. Enter up to 25 characters to create a free-form **Fund Description**.	_ _
3. Select an **Aid Type** from below.	

E = FSEOG	**L = Other Need-Based Loan**	**S = Subsidized Stafford**
F = Pell	**N = Non Need-Based Loan**	**U = Unsubsidized Stafford**
G = Any grant or scholarship	**O = Outside Resources**	**W = Federal Work-Study**
K = Perkins	**P = PLUS**	**Y = Other Work-Study**

4. Enter the **Beginning Fund Balance**.	$

Awards are automatically subtracted from the Beginning Balance. Current (balance) plus Awarded (balance) should equal Beginning Balance (if Adjustments are 0).

5. Enter an **Adjustment** to increase or decrease the Beginning Balance after the initial awarding of the fund.	$

6. Enter parameters to award this fund based on **Remaining Need** (optional).
Does not apply to Fund Types F, O, P, S, U.

#	Minimum Need	Maximum Need	Amount to Award
1			
2			
3			
4			
5			
6			

7. Select the **Packaging Criteria** (optional). Queries match student records with criteria you specify for awarding the fund. For example, Work-Study awards can be limited to students who answered "Yes" on the FAFSA question about the student's interest in Work Study aid. This selection criteria works in addition to the Award Methodology.	

Query Worksheet

What Task do You Want to Perform?	What Module is Available to Create the Query to Perform this Task?
	☐ Apps ☐ Global ☐ DL ☐ Packaging ☐ Pell

Enter a title for the Query that describes the group of students to be selected:

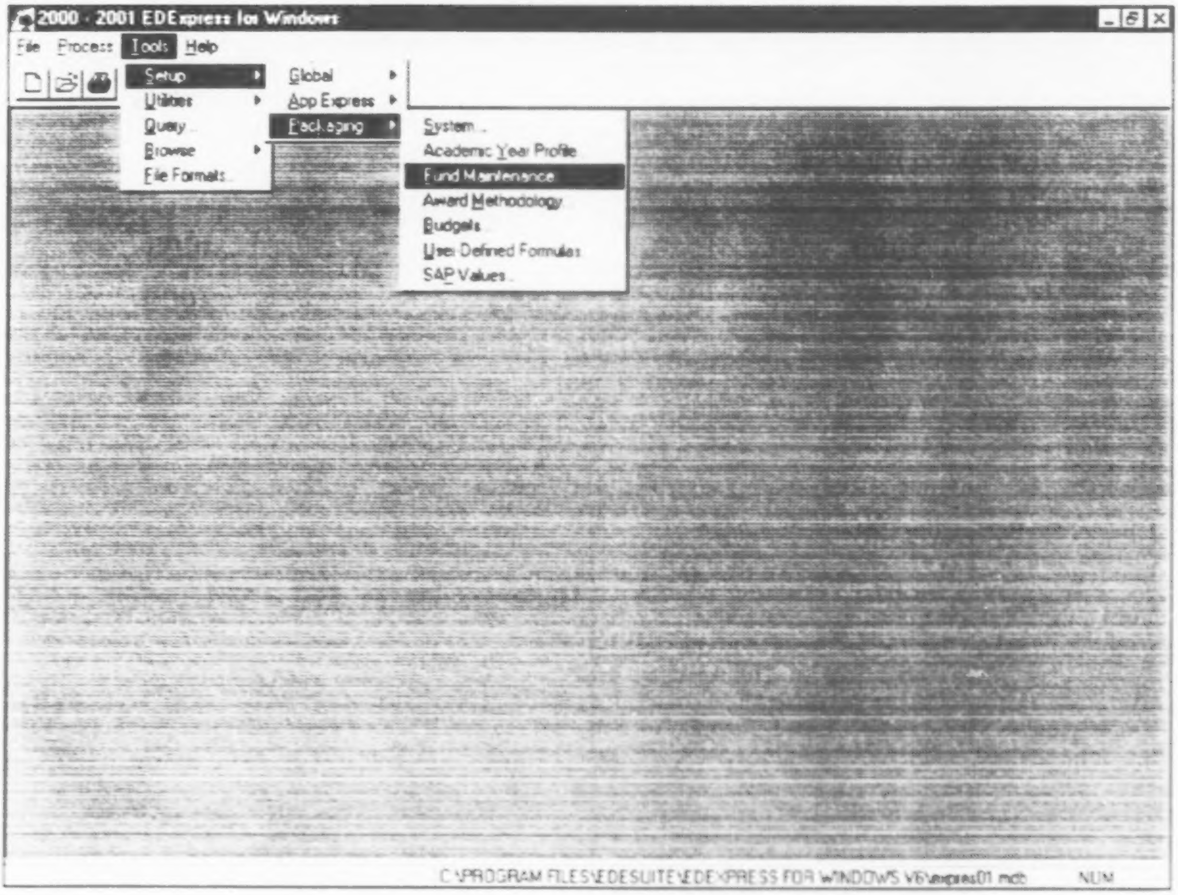
Data Element	Operators	Value
Enter the data field(s) from the Module indicated above	=, <>, <, >, >=, <=, like, not like	☐ Prompt at Execution (to create a parameter query) ☐ Enter free-form or system-assigned value
	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	

Creating a Fund

Now, let's demonstrate how to create the FSEOG fund. Refer to the information on the sample Fund Maintenance Worksheet that follows on the next page.

To create a new fund

*Select **Tools/Setup/Packaging/Fund Maintenance** on the menu bar*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Setup
Utilities
Query...
Browse
File Formats...
Global
App Express
Packaging
System...
Academic Year Profile
Fund Maintenance
Award Methodology
Budgets...
User Defined Formulas
SAP Values...
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

Fund Maintenance Worksheet

1. Enter up to eight characters to create a free-form **Fund Code**.	FSEOG___
2. Enter up to 25 characters to create a free-form **Fund Description**.	Federal SEOG
3. Select an **Aid Type** from below.	E

E = FSEOG
F = Pell
G = Any grant or scholarship
K = Perkins
L = Other Need-Based Loan
N = Non Need-Based Loan
O = Outside Resources
P = PLUS
S = Subsidized Stafford
U = Unsubsidized Stafford
W = Federal Work-Study
Y = Other Work-Study

4. Enter the **Beginning Fund Balance**.	$ 275,000

Awards are automatically subtracted from the Beginning Balance. Current (balance) plus Awarded (balance) should equal Beginning Balance (if Adjustments are 0).

5. Enter an **Adjustment** to increase or decrease the Beginning Balance after the initial awarding of the fund.	$

6. Enter parameters to award this fund based on **Remaining Need** (optional).
Does not apply to Fund Types F, O, P, S, U.

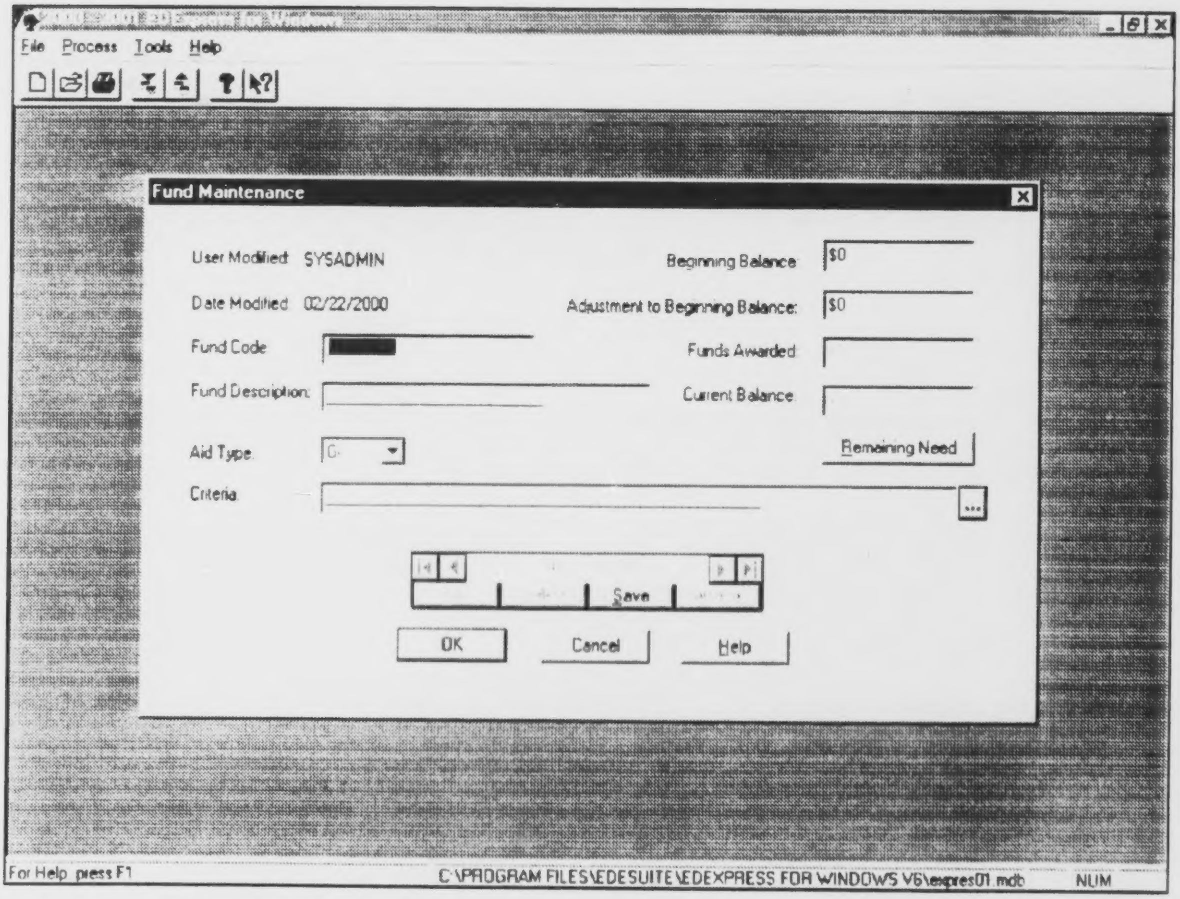
#	Minimum Need	Maximum Need	Amount to Award
1	2000	3500	1000
2	3501	99999	2000
3			
4			
5			
6			

7. Select the **Packaging Criteria** (optional). Queries match student records with criteria you specify for awarding the fund. For example, Work-Study awards can be limited to students who answered "Yes" on the FAFSA question about the student's interest in Work Study aid. This selection criteria works in addition to the Award Methodology.	Undergraduates, EFC < 501

The Fund Maintenance dialog box displays

If this is the first fund record in the database, just begin entering the data

If fund records already exist, click ***Add***


File
Process
Tools
Help
Fund Maintenance
Remaining Need
Save
OK
Cancel
Help

User Modified: SYSADMIN

Date Modified: 02/22/2000

Fund Code:

Fund Description:

Aid Type: G

Criteria:

Beginning Balance: $0

Adjustment to Beginning Balance: $0

Funds Awarded:

Current Balance:

For Help, press F1

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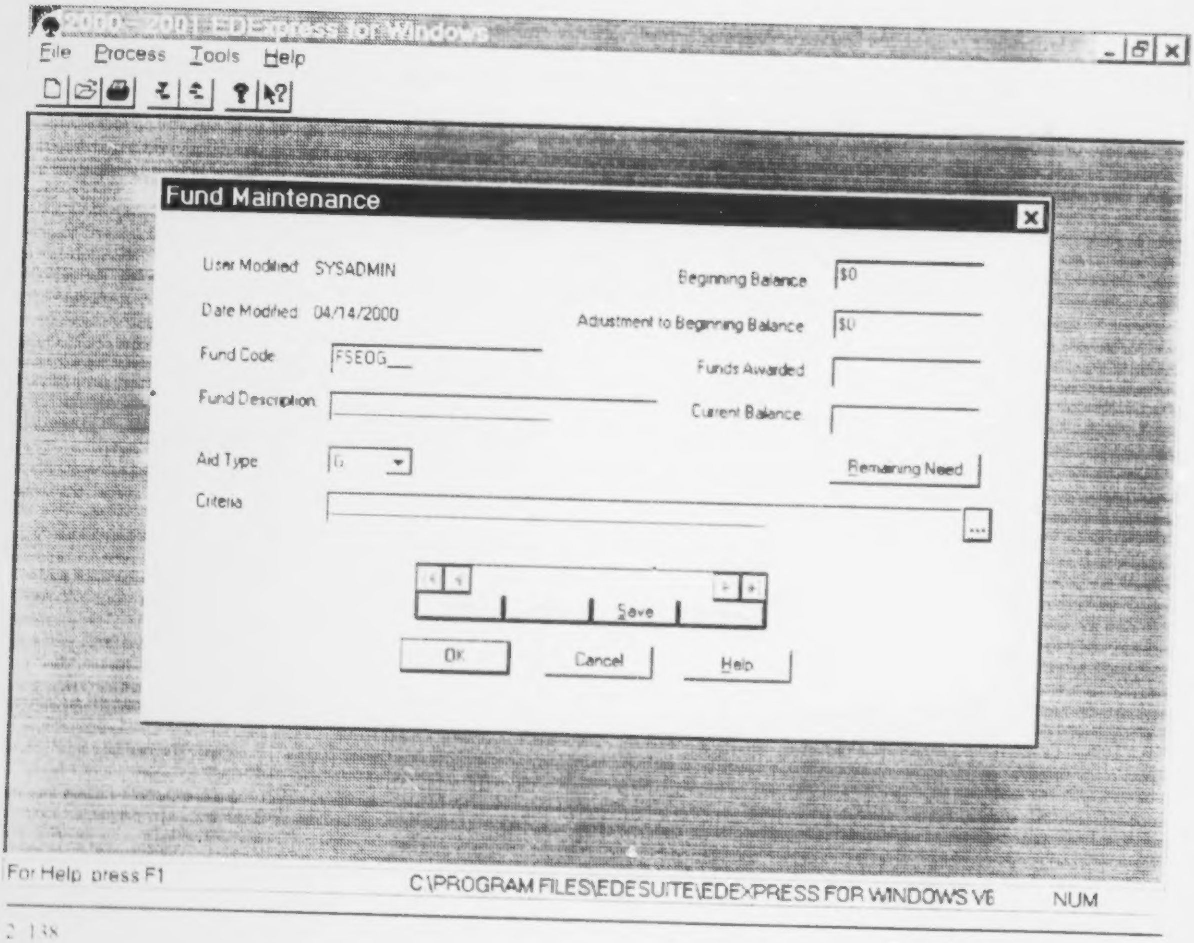
NUM

Enter a descriptive ***Fund Code*** *(up to 8 characters)*


File
Process
Tools
Help
Remaining Need
Save
OK
Cancel
Help

2000 - 2001 EDExpress for Windows

Fund Maintenance

User Modified SYSADMIN

Date Modified 04/14/2000

Fund Code FSEOG

Fund Description

Aid Type G

Criteria

Beginning Balance $0

Adjustment to Beginning Balance $0

Funds Awarded

Current Balance

For Help press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6 NUM

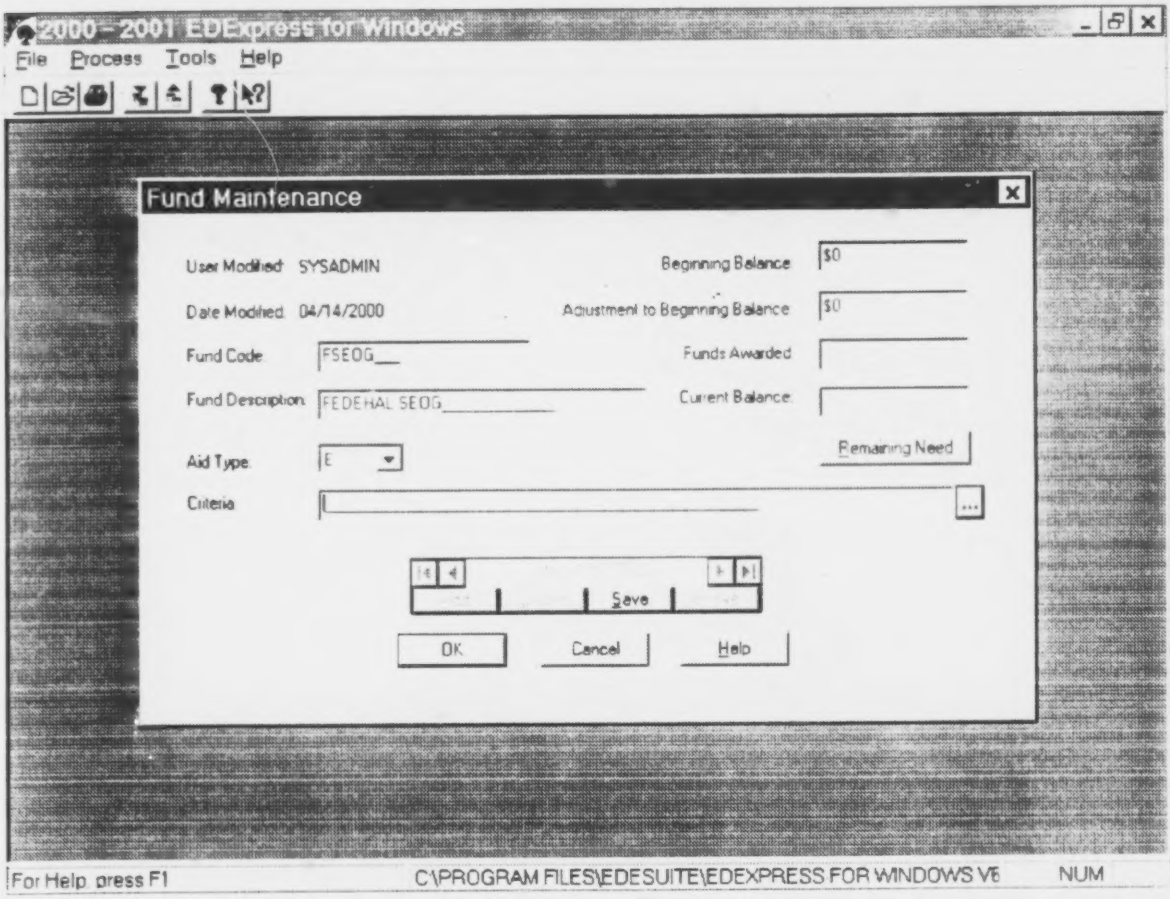
The Aid Type you select determines how the fund is treated in the packaging process (grant vs self-help)

Remember: *Aid Type codes E, F, K, P, S, W and U may be used only once*

NEW! Aid Type Y is for non-federal Work-Study programs

Enter the ***Fund Description*** *(up to 25 characters)*

Select the appropriate ***Aid Type*** *code from the drop-down list*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Fund Maintenance
Remaining Need
Save
OK
Cancel
Help
NUM

User Modified SYSADMIN

Date Modified 04/14/2000

Fund Code FSEOG

Fund Description FEDERAL SEOG

Aid Type E

Criteria

Beginning Balance $0

Adjustment to Beginning Balance $0

Funds Awarded

Current Balance

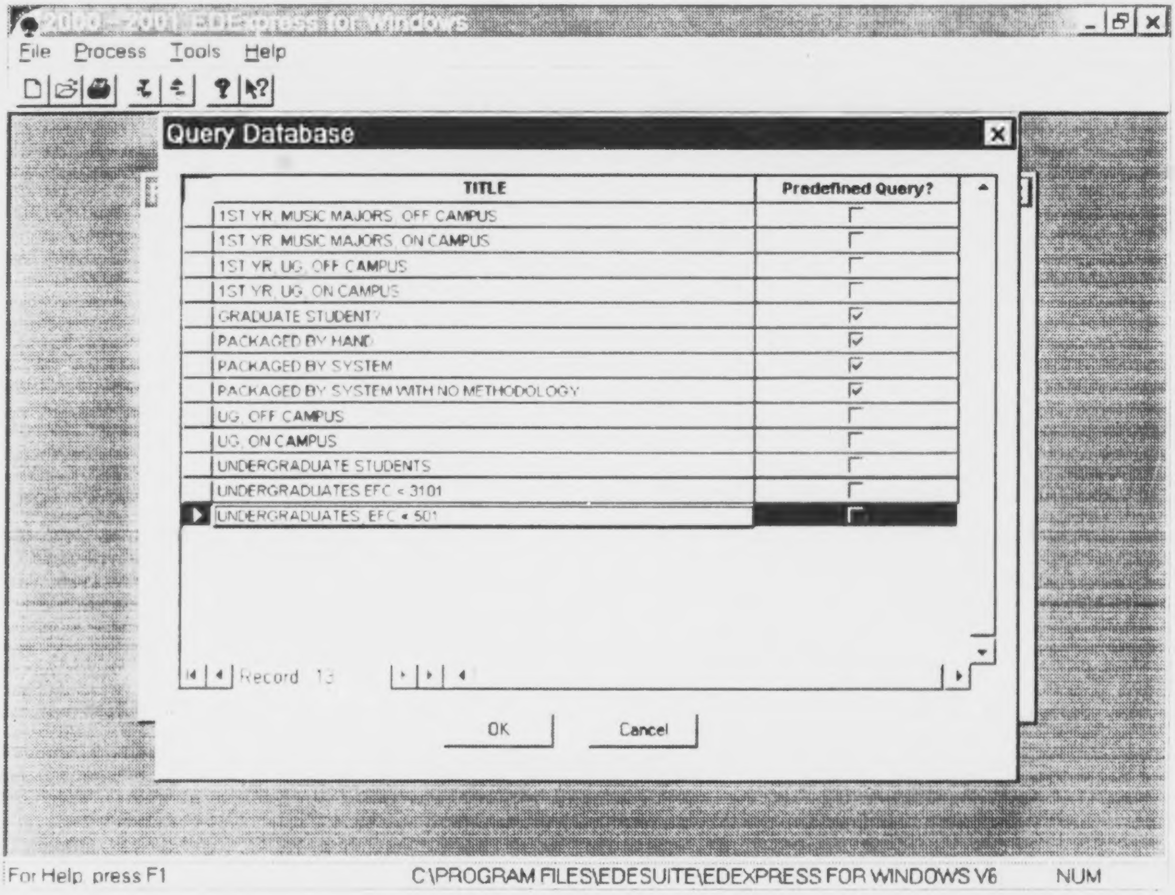
For Help press F1

C\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6

Click the ***ellipsis (...) button*** *to view the list of queries*

Select the desired query and click ***OK***

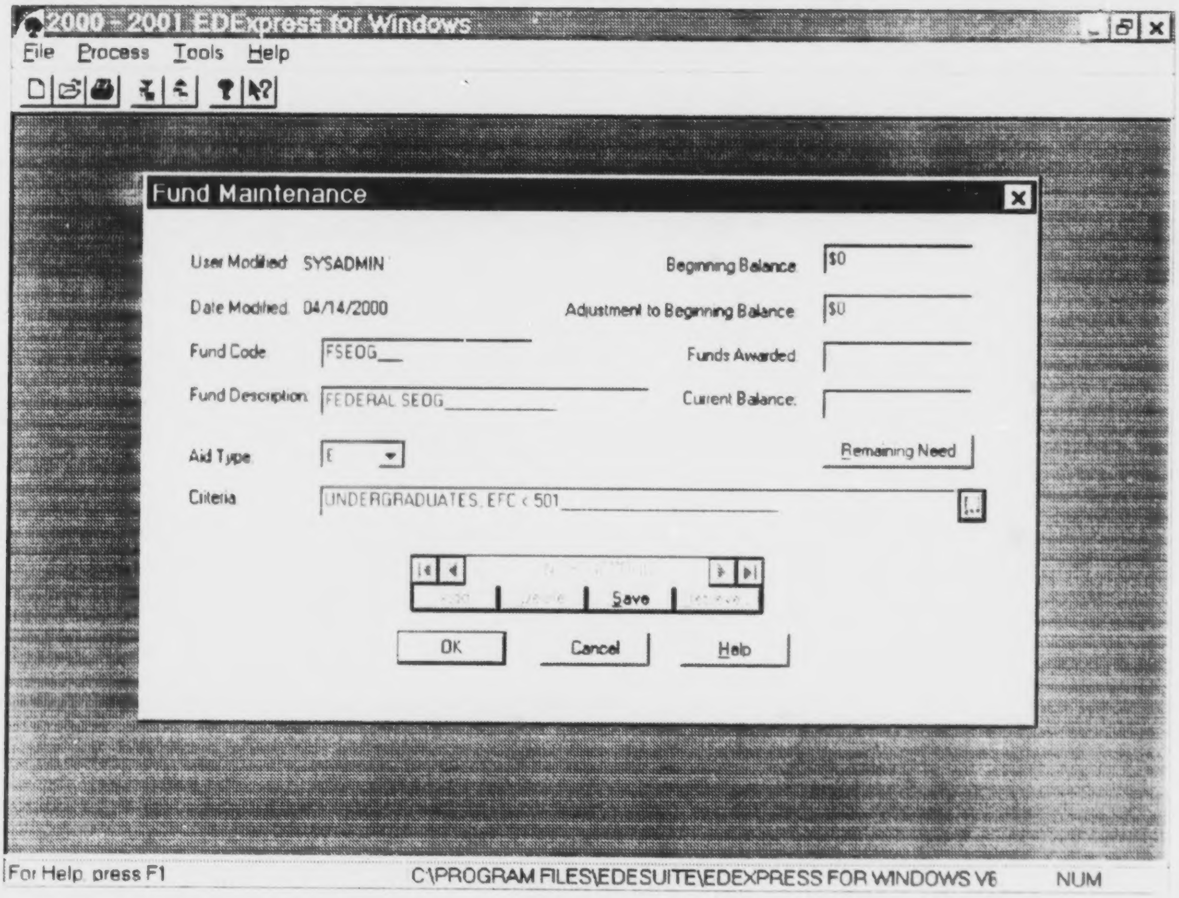
The Criteria field is an optional field in Fund Maintenance setup However, if you want to limit the population of those who receive this fund, enter the title of an existing query created in the Packaging database in the Criteria field


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Query Database
Record 13
OK
Cancel

TITLE	Predefined Query?
1ST YR. MUSIC MAJORS, OFF CAMPUS	☐
1ST YR. MUSIC MAJORS, ON CAMPUS	☐
1ST YR. UG, OFF CAMPUS	☐
1ST YR. UG, ON CAMPUS	☐
GRADUATE STUDENT?	☑
PACKAGED BY HAND	☑
PACKAGED BY SYSTEM	☑
PACKAGED BY SYSTEM WITH NO METHODOLOGY	☑
UG, OFF CAMPUS	☐
UG, ON CAMPUS	☐
UNDERGRADUATE STUDENTS	☐
UNDERGRADUATES EFC < 3101	☐
UNDERGRADUATES, EFC < 501	☐

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6 NUM

The query title displays


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Fund Maintenance
Remaining Need
Save
OK
Cancel
Help

User Modified: SYSADMIN

Date Modified: 04/14/2000

Fund Code: FSEOG

Fund Description: FEDERAL SEOG

Aid Type: E

Criteria: UNDERGRADUATES, EFC < 501

Beginning Balance: $0

Adjustment to Beginning Balance: $0

Funds Awarded:

Current Balance:

For Help, press F1

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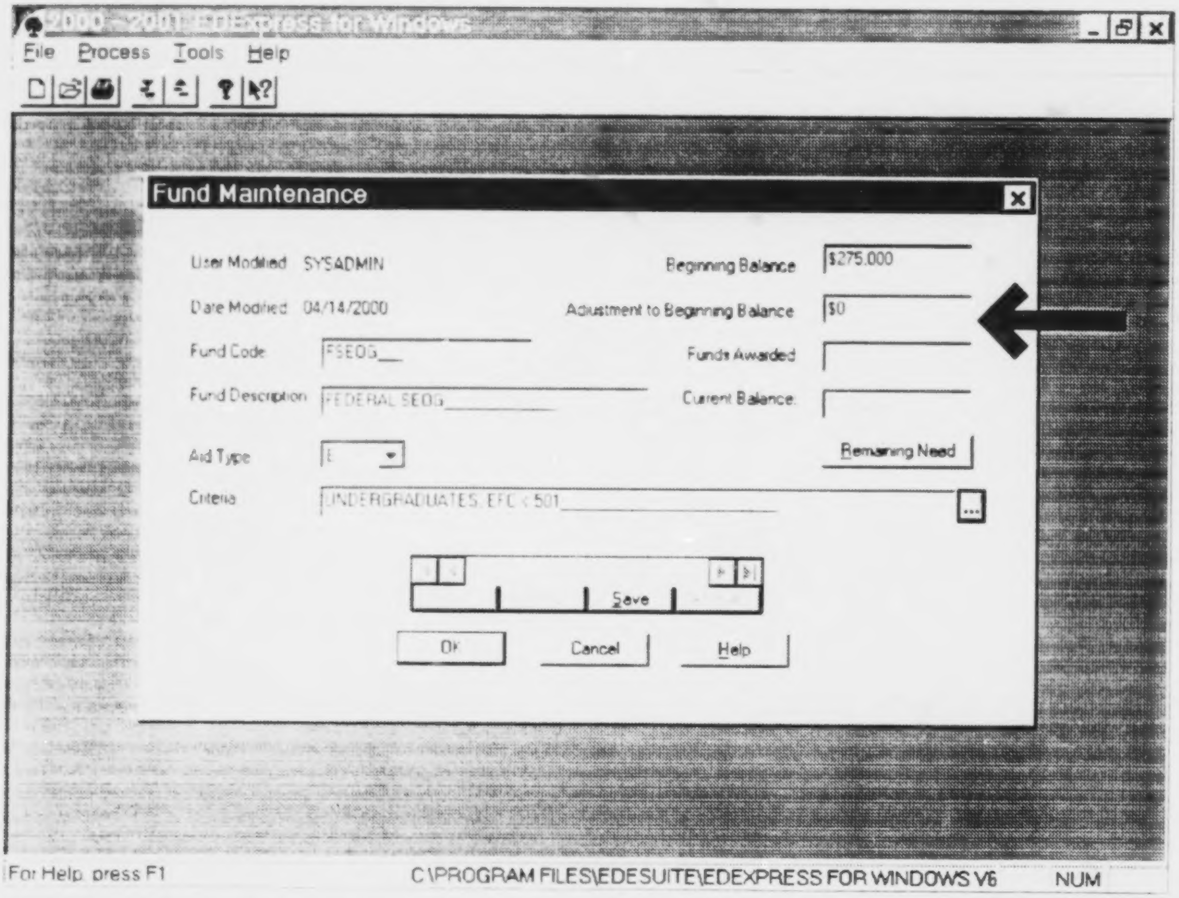
NUM

*In the **Beginning Balance** field, enter the amount available to award from this fund.*

Then tab out of the field. Notice that the Current Balance field automatically updates.

Remember: *Once the fund record is saved, you cannot update the value in the Beginning Balance field. If the amount available to award changes, adjustments must be entered in the Adjustment to Beginning Balance field.*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Fund Maintenance
Remaining Need
Save
OK
Cancel
Help
For Help, press F1
NUM

User Modified SYSADMIN
Date Modified 04/14/2000
Fund Code FSEOG
Fund Description FEDERAL SEOG
Aid Type F
Criteria UNDERGRADUATES, EFC < 501
Beginning Balance $275,000
Adjustment to Beginning Balance $0
Funds Awarded
Current Balance

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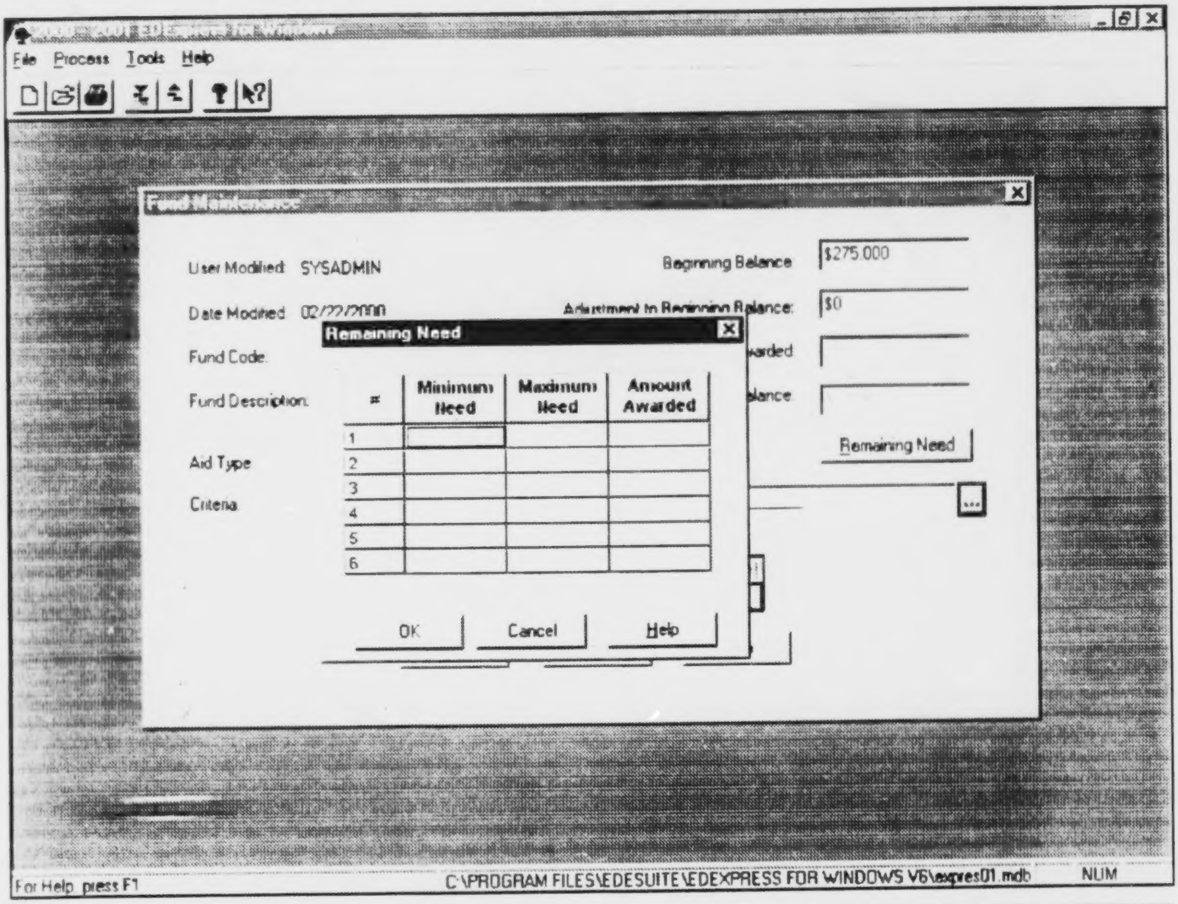
The Packaging System offers the option of awarding specific amounts of a fund based on the amount of Remaining Need at the time the fund is awarded

If you want the system to package an amount based on remaining need (after Stafford loans), click the ***Remaining Need*** *button and enter the values*

☝ ***Remember:*** *Remaining Need excludes aid type F, O, S, U, and P, but works in conjunction with Award Methodology*


2000 - 2001 EDExpress for Windows
File Process Tools Help
Fund Maintenance
Remaining Need
OK
Cancel
Help
Remaining Need
Fund Code
Fund Description
Aid Type
Criteria

User Modified: SYSADMIN

Date Modified: 02/22/2000

Beginning Balance: $275,000

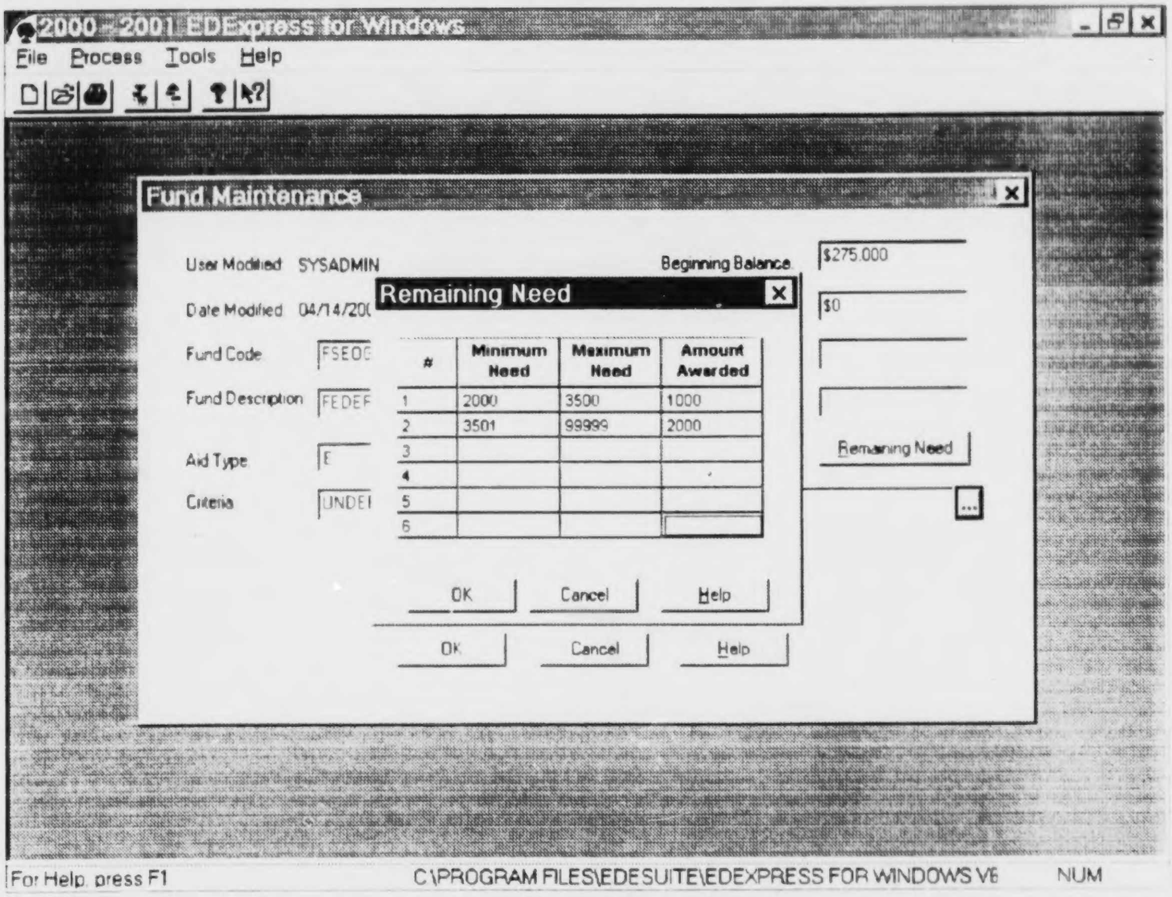
Adjustment to Beginning Balance: $0

#	Minimum Need	Maximum Need	Amount Awarded
1			
2			
3			
4			
5			
6			

For Help, press F1   C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb   NUM

After entering the figures for Remaining Need, click ***OK***

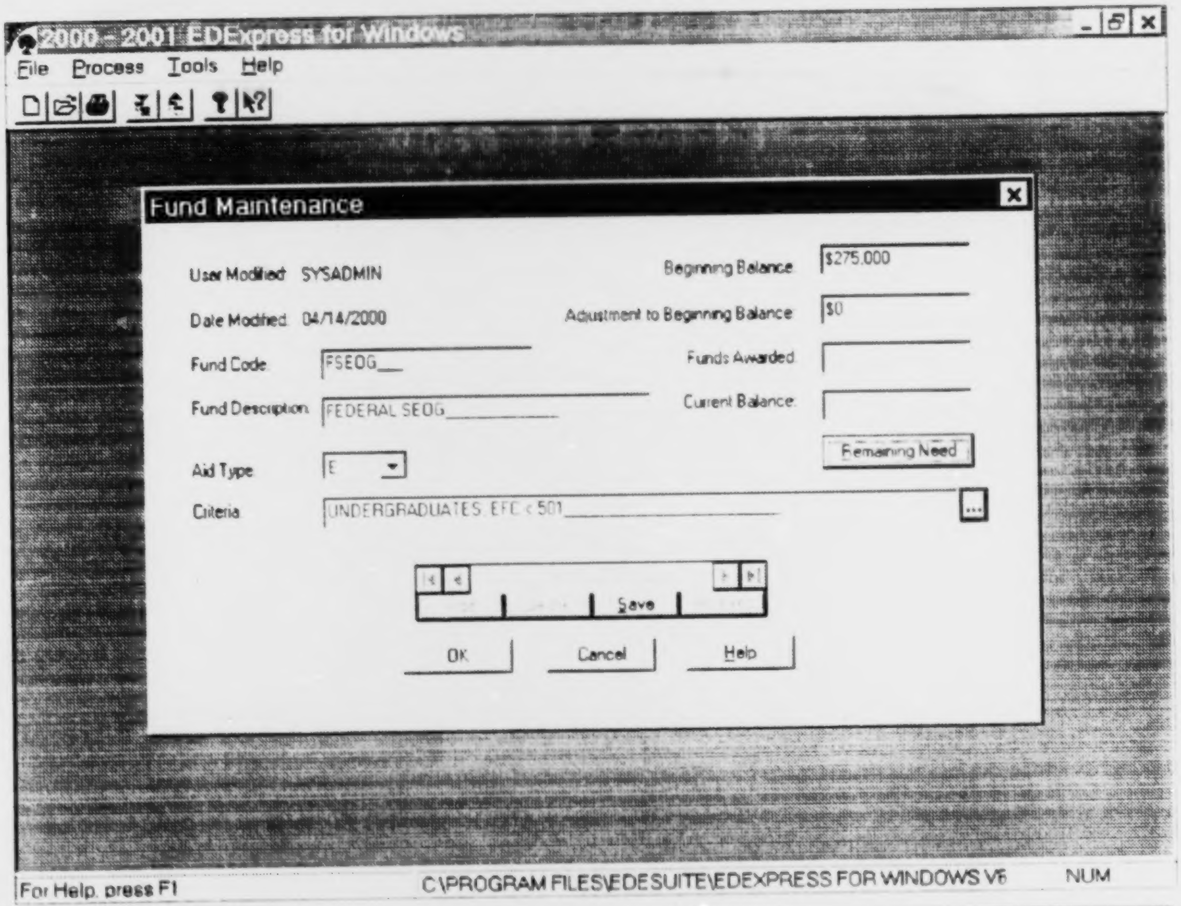
In this example, we want to award $1,000 FSEOG to undergraduate students who have remaining need between $2,000 and $3,500, and $2,000 in FSEOG to those who have remaining need higher than 3501.


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Fund Maintenance
Remaining Need
Remaining Need
OK
Cancel
Help
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

User Modified SYSADMIN
Date Modified 04/14/200
Fund Code FSEO
Fund Description FEDEF
Aid Type E
Criteria UNDE
Beginning Balance $275,000
$0

#	Minimum Need	Maximum Need	Amount Awarded
1	2000	3500	1000
2	3501	99999	2000
3			
4			
5			
6			

To save the new FSEOG fund record click **Save**


2000 - 2001 EDExpress for Windows
File Process Tools Help
Fund Maintenance
Remaining Need
Save
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

User Modified: SYSADMIN
Date Modified: 04/14/2000
Fund Code: FSEOG
Fund Description: FEDERAL SEOG
Aid Type: E
Criteria: UNDERGRADUATES, EFC < 501
Beginning Balance: $275,000
Adjustment to Beginning Balance: $0
Funds Awarded:
Current Balance:

A Record Updates Saved dialog box displays

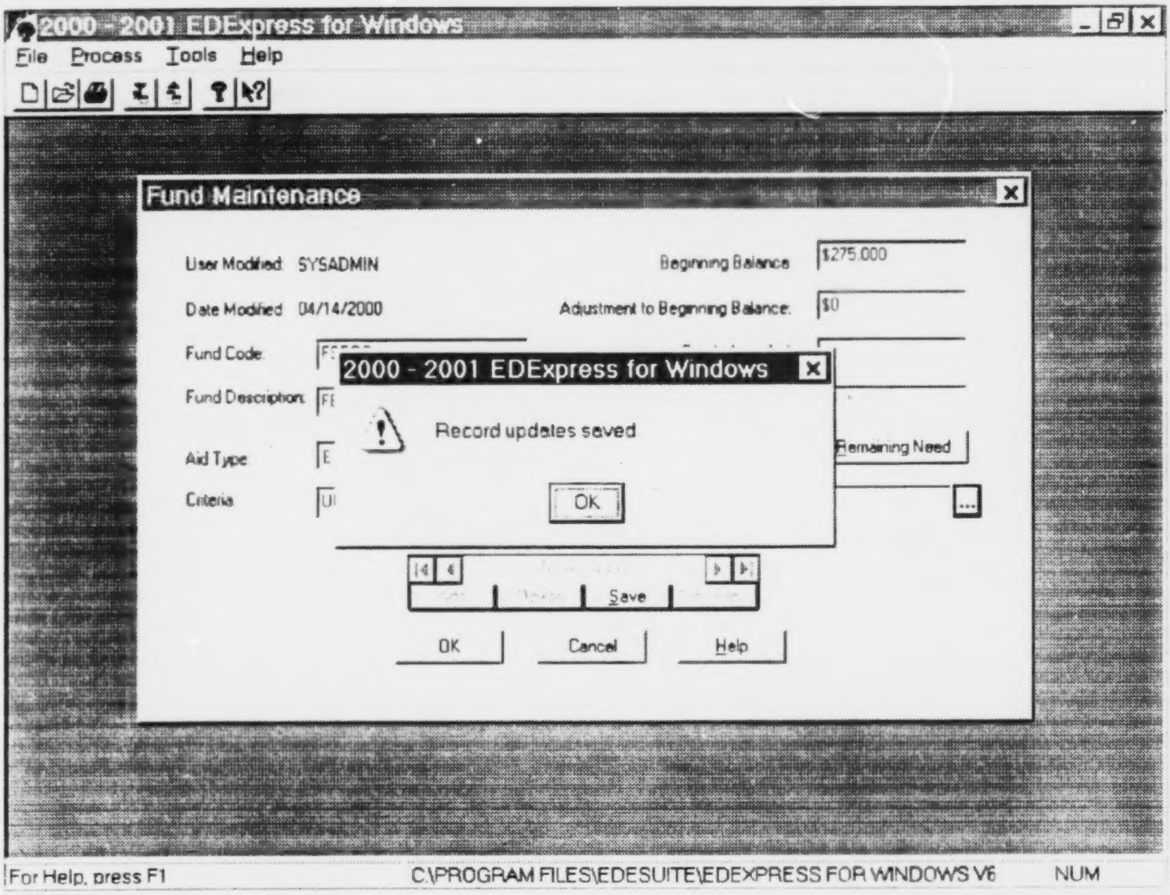
Click **OK**

Click **Add** to continue entering funds

Otherwise, click **OK** or **Cancel** to exit

Tip: To cancel your entries and start over, click Cancel to close the Fund Maintenance dialog. Go back to the Tools menu and select Setup/Packaging/Fund Maintenance, click Add, and enter the new record.

You cannot delete a fund record if funds have been awarded or if the fund record is attached to an Award Methodology.


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Fund Maintenance
Remaining Need
Save
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

User Modified: SYSADMIN

Date Modified: 04/14/2000

Fund Code:

Fund Description:

Aid Type:

Criteria:

Beginning Balance: $275,000

Adjustment to Beginning Balance: $0

2000 - 2001 EDExpress for Windows

Record updates saved

OK

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Award Methodology

An award methodology is a systematic method for determining which student or groups of students will receive certain funds, the amounts of those funds, and the priority in which those funds will be awarded. The basic function of award methodologies within EDExpress Packaging is to have the system automatically package aid based on the student's need.

Award methodologies fuel the Packaging system. To set up any efficiently run packaging system, you must carefully plan out your awarding strategy before you begin to package students. Then, you transfer this strategy to the award methodologies you'll create in the software. These methodologies can be very simple, or they can be very complicated.

As you develop your award methodologies, keep in mind the basic awarding rules of the EDExpress Packaging system. The most important rule is that award methodologies package aid taking into account student budgets and unmet need. Regardless of the various parameters you define, including aid type, the system won't package aid in excess of cost of attendance. Nor will it package in excess of need, with the exception of unsubsidized and PLUS loans. Therefore, before you begin setting up award methodologies, you must devise a strategy on how you'll handle non-need based awards and students with no need, including those who won't file the FASFA.

EDExpress gives you the ability to create up to 999 methodologies. Each has a unique code and priority. And each *may be* tied to a query created in the Packaging module to specify which students should receive the funds.

[Slide 2-33]

For each Award Methodology created, you must consider the following components:

- Code
- Title
- Priority
- Self-Help Aid Maximum (% or $)
- Gift Aid Maximum (% or $)
- Criteria (Query)
- Fund Code
- Fund Priority
- School Minimum
- School Maximum
- Minimum EFC
- Maximum EFC
- Remaining Need

Code

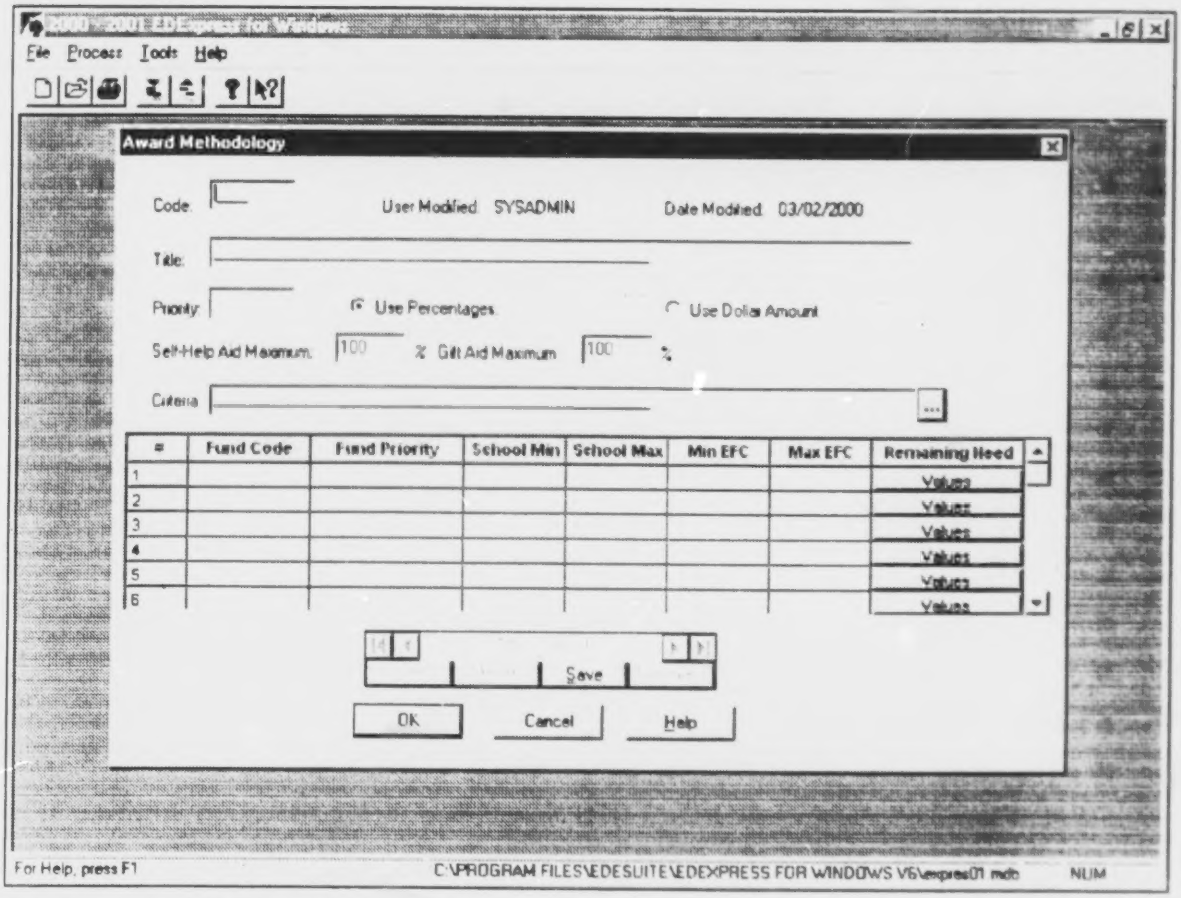
The unique four-character code you select identifies the methodology. The code can consist of any combination of alphanumeric characters. The code cannot be changed after the award methodology record has been added to the database.

Title

The title, or the description of the award methodology, should identify the students who will be packaged. For example, In-State Freshmen, Independent Upperclassmen, etc. When space is available, the title prints on reports and displays on screens. It can consist of any valid keyboard character, except the pipe symbol (|).

Priority

This required numeric field (001-999) indicates the order that the methodology database is searched. The first methodology with which the student meets the selection criteria will be used to package that student.



Code:

User Modified: SYSADMIN

Date Modified: 03/02/2000

Title:

Priority:

● Use Percentages

○ Use Dollar Amount

Self-Help Aid Maximum: 100 %

Gift Aid Maximum: 100 %

Criteria:

#	Fund Code	Fund Priority	School Min	School Max	Min EFC	Max EFC	Remaining Need
1							Values
2							Values
3							Values
4							Values
5							Values
6							Values

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

NUM

Self-Help and Gift Aid Maximums

You must tell the system how to calculate the maximum amounts of both self-help aid and gift aid that can be awarded to satisfy unmet need. These maximums are based either on percentages *or* on dollar amounts. Then, depending on your preference, you enter either a maximum percentage or a maximum dollar amount. Valid percentages are 000 to 100, while valid dollar amounts are 00000 to 99999.

Criteria

This field gives you the option of using selection criteria (or a query) to determine the methodology applied to a given record. Click the ellipsis ( ) button to display a list of titles created from the Query function.

You may want to establish one methodology that uses no selection criteria to ensure that every student can be packaged. Remember, the priority code determines which methodology will be used for packaging. So, you should assign higher priority numbers to methodologies not based on specific criteria.

Data is not required in this field. Therefore, to establish a methodology without using Selection Criteria, simply skip over the field. If you decide later to assign criteria to the award methodology, you can always go back and attach a query.

Fund Code

Fund code(s) specify what funds will be packaged using the award methodology and are required. These codes are the ones you created in the Fund Maintenance setup. You can enter up to 20 unique fund codes for each award methodology. Individual fund codes can be used in more than one award methodology, and they can be used more than once within the same methodology.

An award methodology's fund codes can be updated, as long as no students have been packaged using the funds. Also, because eligible recipients automatically receive Pell Grant funds, the Pell fund code doesn't need to be tied to an award methodology.

[Slide 2-34]

Fund Priority

This is the order in which the individual funds you tie to a specific award methodology are awarded. Each fund included in an award methodology must be assigned a unique fund priority number (from 1-20).

School Minimum and Maximum

For each fund identified in the award methodology, you can define the minimum and maximum amounts to be awarded for this particular fund within this award methodology Valid amounts are 00000 to 99999 Both fields default to zero

Minimum and Maximum EFCs

You also can specify the minimum and maximum EFCs allowed for the funds to be packaged using this award methodology Valid amounts are 00000 to 99999 The system defaults to a value of 00000 for the minimum EFC and to 99999 for the maximum EFC

Remaining Need

The Award Methodology setup displays a Remaining Need column Amounts of remaining need previously tied to funds are displayed when you click on the Values button, allowing you to update the amounts Even if you didn't define remaining need for a particular fund when you set up the fund, you can do so when setting up the award methodology

Note that the values for remaining need entered under the Award Methodology setup take precedence over those entered under the Fund Maintenance setup

The EDExpress Packaging system makes certain checks against your various setups and packages awards according to the following priorities

- Current Balance of fund (Fund Maintenance)
- School Min and Max award amounts (Award Methodology)
- Limits set for self-help and gift aid (Award Methodology)
- Statutory maximum awards (Fund Maintenance)
- Student's remaining need
- Award amount based on Remaining Need value (Award Methodology before Fund Maintenance)

[Slide 2-35]

Tips about Award Methodologies

- To electronically package any fund, the fund must be tied to an award methodology.
- Group award methodologies together by category. Then, assign a range of award methodology priority numbers larger than the number of methodologies in the category. If you need to add/insert more methodologies, you will not have to resequence the priority numbers of the existing methodologies.
- Students are electronically packaged on the basis of only one award methodology. A student who meets more than one award methodology will be assigned to the methodology with the highest priority (where 001 is the highest priority and 999 is the lowest).
- Once the award methodology has been saved, be very careful about making changes. If you need to remove a fund code from an award methodology, highlight the fund code and press your delete key. Or you can delete the award methodology record and start over.
- You cannot delete an award methodology that has been used to package students.
- Pell Grant awards are not restricted/considered when self-help and gift aid maximum amounts are invoked.
- Even if no award methodology is created, the system will always package Pell-eligible students. On the other hand, if methodologies do exist and these students aren't selected by any award methodology, they will be packaged only with Pell.
- For Stafford and PLUS Loans, enter 99999 as the maximum award amount so that the system will correctly invoke statutory loan limits.
- After completing all of your setups, you should review the queries tied to both Award Methodology and Fund Maintenance to be sure the queries are selecting students who meet your criteria. For your first packaging efforts, you might want to work with a smaller population or test group of students.
- A query attached to an award methodology runs before a query attached to a fund defined in the award methodology. If you want to include queries at both levels, the query attached to the award methodology should be very general to include a wider population, while the one attached to the fund can be more specific. For example, a particular award methodology has a query that selects undergraduate students (general) and includes a fund for a state grant. The query attached to the fund selects undergraduate students who are residents of that particular state (more specific).
- After the packaging process runs, the award methodology used to package the student is displayed in the Award Methodology field on the Awards tab. For those students not meeting criteria of any of the award methodologies, the Award Methodology field is left blank.

[Slide 2-36]

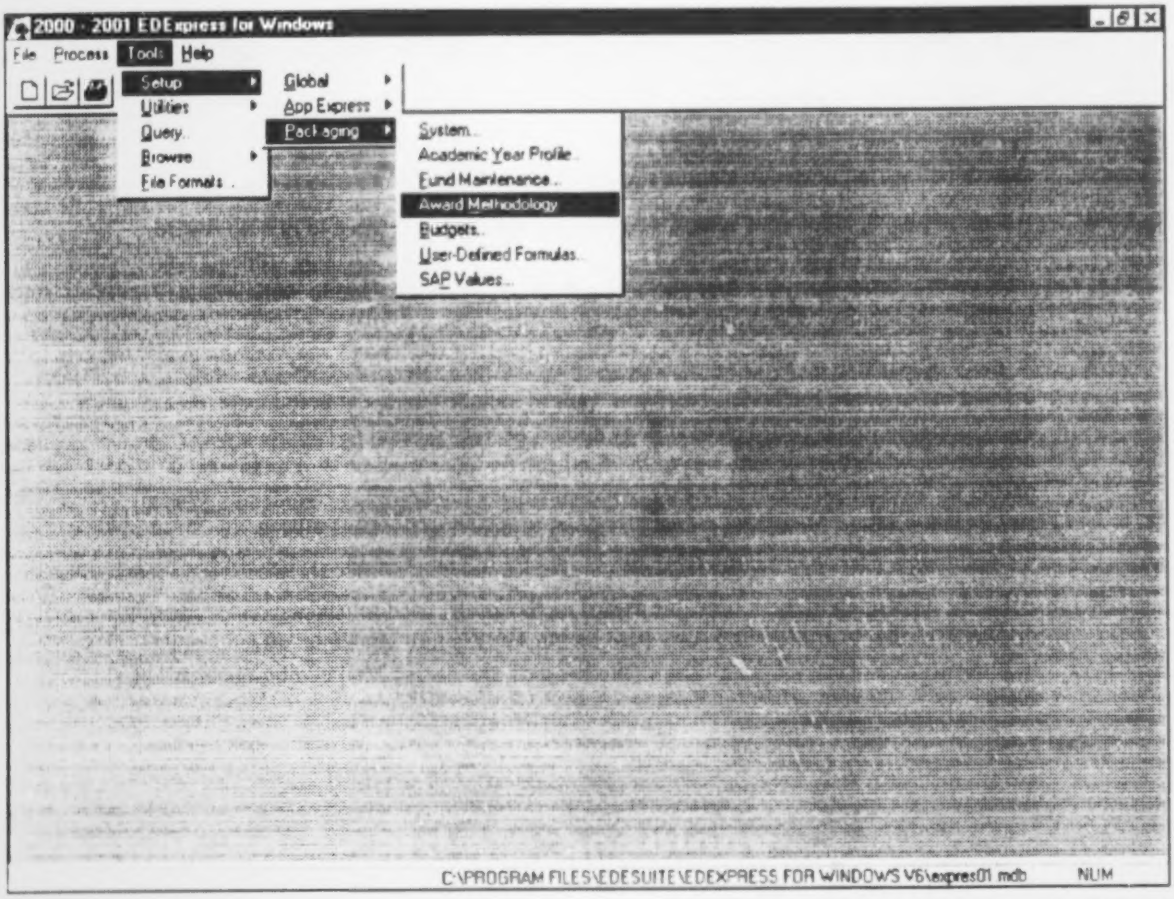
Creating an Award Methodology

To create a new award methodology

Select **Tools/Setup/Packaging/Award Methodology** from the menu bar

Before entering data in the Award Methodology setup, you should complete an Award Methodology Worksheet for each of your methodologies. This tool will assist you in getting organized and planning your packaging strategy.

The following example demonstrates how to create an award methodology in the software. As indicated on the sample Award Methodology Worksheet on the following page, this particular methodology includes non-federal, need-based aid awarded in varying amounts according to whether students live on campus (Fund Code = On Camp) or off campus (Fund Code = Off Camp).


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Setup
Utilities
Query...
Browse
File Formats...
Global
App Express
Packaging
System...
Academic Year Profile...
Fund Maintenance...
Award Methodology
Budgets...
User-Defined Formulas...
SAP Values...
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

Award Methodology Worksheet

1. Establish up to a 4-character code to identify the award methodology		**UG**
2. Enter up to 50 characters to create a free-form description of the award methodology. **Undergraduates**		
3. Establish a 3-character priority number for this award methodology. If a student is selected for more than one methodology, the highest priority methodology is applied.		**1**
4. For Aid Maximums use:	☑ Percentages	☐ Dollar Amounts
5. The maximum percentage or dollar amount of the total award package that is awarded as self-help aid, either work-study or loans.		**100%**
6. The maximum percentage or dollar amount of the total award package that can be awarded as gift aid.		**100%**
7. Select a Query that is used to select the group of students for this funding package (optional). **Undergraduate Students**		

8. Establish award parameters for up to 20 specific funds (Pell Grant is hard coded and therefore not entered on this table).

Identify fund to award	Identify priority of award	Identify minimum award	Identify maximum award	Identify minimum EFC to make award	Identify maximum EFC to make award	Refer to supplemental worksheet*
Fund Code	**Priority**	**Minimum $**	**Maximum $**	**Minimum EFC**	**Maximum EFC**	**Remaining Need**
FSEOG	1	200	2000	0	99999	*
FWS	2	1000	2500	0	13500	
On Camp	3	500	3500	0	13500	*
Off Camp	4	500	1500	0	13500	*
Sub	5	200	99999	0	99999	
Unsub	6	200	99999	0	99999	
PLUS	7	200	99999	0	99999	

*Award Methodology Remaining Need Worksheet

Fund Code: **FSEOG**

#	Minimum Need	Maximum Need	Amount to Award
1	2000	3500	1000
2	3501	99999	2000
3			
4			
5			
6			

Fund Code: **On Camp**

#	Minimum Need	Maximum Need	Amount to Award
1	2500	4000	1500
2	4001	99999	2500
3			
4			
5			
6			

Fund Code: **Off Camp**

#	Minimum Need	Maximum Need	Amount to Award
1	3500	5000	1000
2	5001	99999	1500
3			
4			
5			
6			

Fund Code:

#	Minimum Need	Maximum Need	Amount to Award
1			
2			
3			
4			
5			
6			

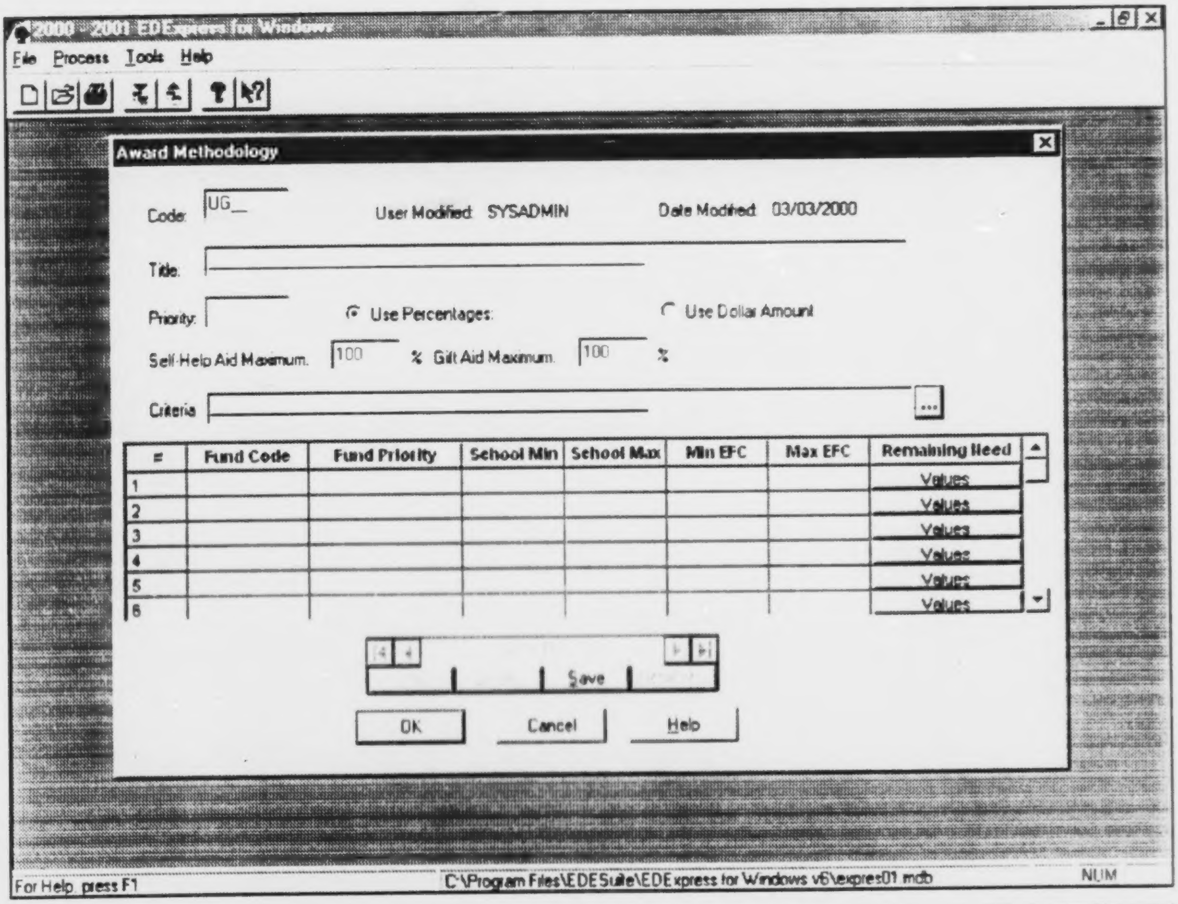
Fund Code:

#	Minimum Need	Maximum Need	Amount to Award
1			
2			
3			
4			
5			
6			

The Award Methodology dialog box displays

If this is the first record to be entered, begin typing on the blank form. Otherwise, click **Add** to bring up a blank form

Enter the four-character **Code** to identify the award methodology record


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Award Methodology
Save
OK
Cancel
Help
For Help, press F1
NUM

Code: UG__
User Modified: SYSADMIN
Date Modified: 03/03/2000
Title:
Priority:
● Use Percentages:
○ Use Dollar Amount
Self-Help Aid Maximum: 100 %
Gift Aid Maximum: 100 %
Criteria:

#	Fund Code	Fund Priority	School Min	School Max	Min EFC	Max EFC	Remaining Need
1							Values
2							Values
3							Values
4							Values
5							Values
6							Values

C:\Program Files\EDESuite\EDExpress for Windows v6\expres01.mdb

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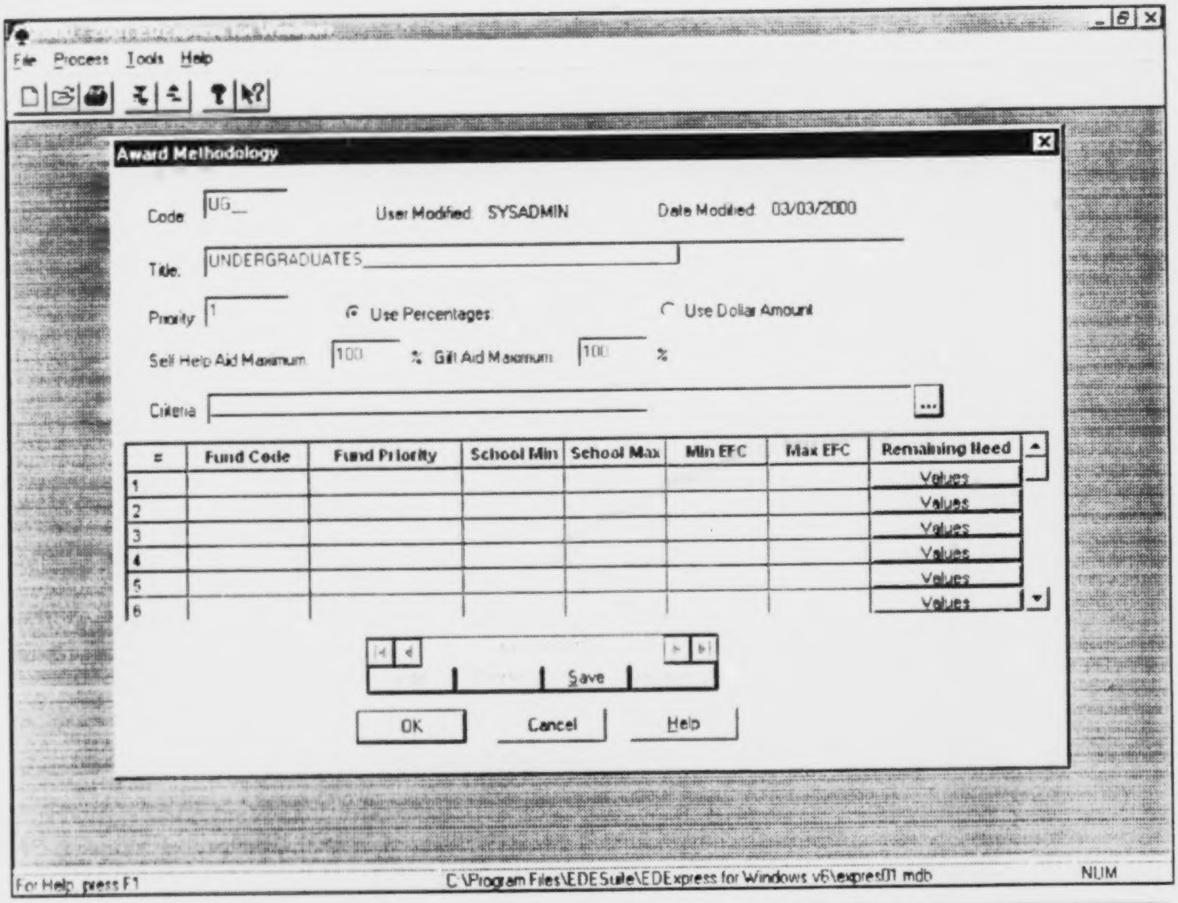
Enter a free-form ***Title*** *that identifies students to be packaged using this methodology*

Enter the ***Priority Code***

Valid priority codes are 1 to 999

Note: *When space is available, the Award Methodology title prints on reports and display screens*

The priority field indicates the order in which the methodology database is searched. The first Award Methodology that matches a student's attributes is used to package that student.



Award Methodology

Code: UG

User Modified: SYSADMIN

Date Modified: 03/03/2000

Title: UNDERGRADUATES

Priority: 1

● Use Percentages

○ Use Dollar Amount

Self Help Aid Maximum: 100 %

Gift Aid Maximum: 100 %

Criteria:

#	Fund Code	Fund Priority	School Min	School Max	Min EFC	Max EFC	Remaining Need
1							Values
2							Values
3							Values
4							Values
5							Values
6							Values

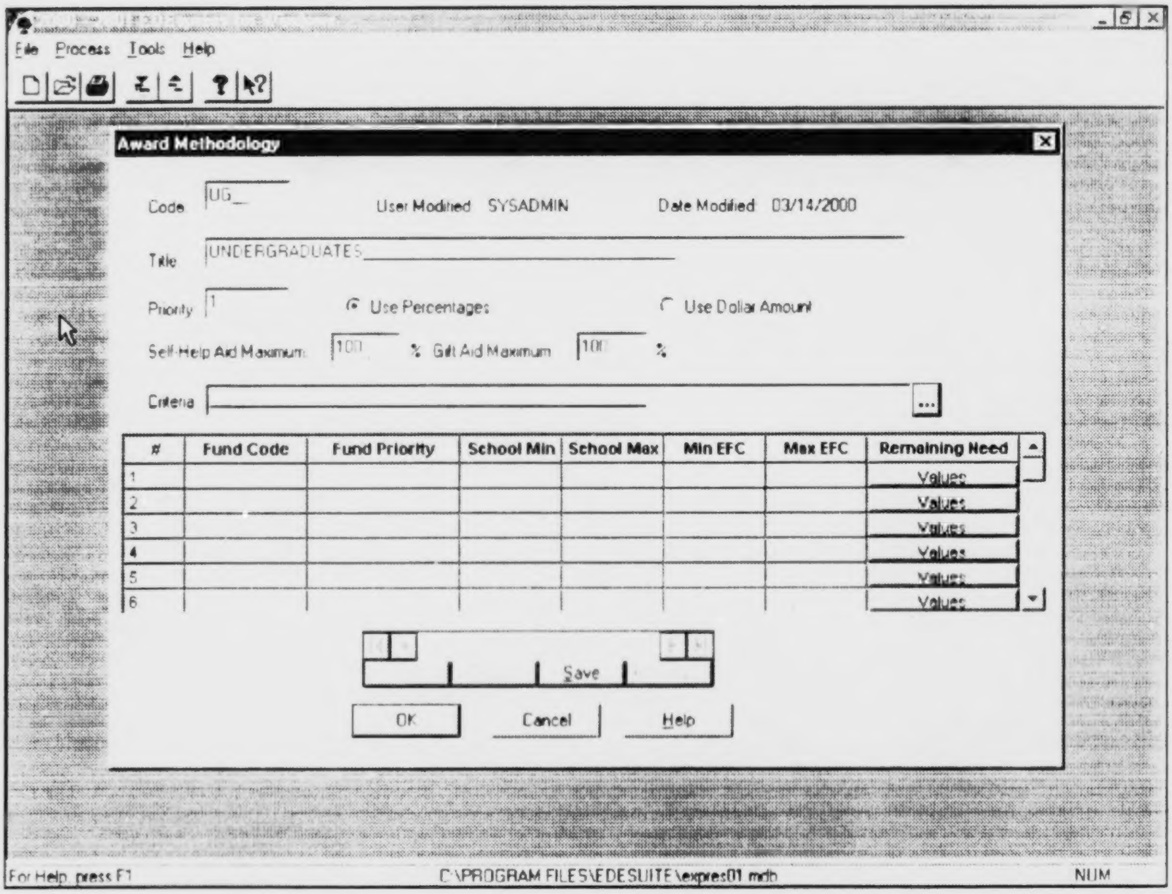
C:\Program Files\EDESuite\EDExpress for Windows v6\expres01.mdb

You must set limits for the amounts of self-help and gift aid that can be packaged to satisfy unmet need. You must impose these limits using either percentages or dollar amounts. Note that the method you choose will be applied to both self-help and gift aid.

Self-help aid consists of loans and work, while gift aid consists of grants. The system makes the distinction between self-help and gift aid according to the aid types assigned to funds.

The system automatically defaults to ***Use Percentages***

Because this example uses percentages to limit the amount of self-help and gift aid that can be packaged, keep the default value.



Award Methodology

Code: UG
User Modified: SYSADMIN
Date Modified: 03/14/2000
Title: UNDERGRADUATES
Priority: 1
● Use Percentages ○ Use Dollar Amount
Self-Help Aid Maximum: 100 %
Gift Aid Maximum: 100 %
Criteria:

#	Fund Code	Fund Priority	School Min	School Max	Min EFC	Max EFC	Remaining Need
1							Values
2							Values
3							Values
4							Values
5							Values
6							Values

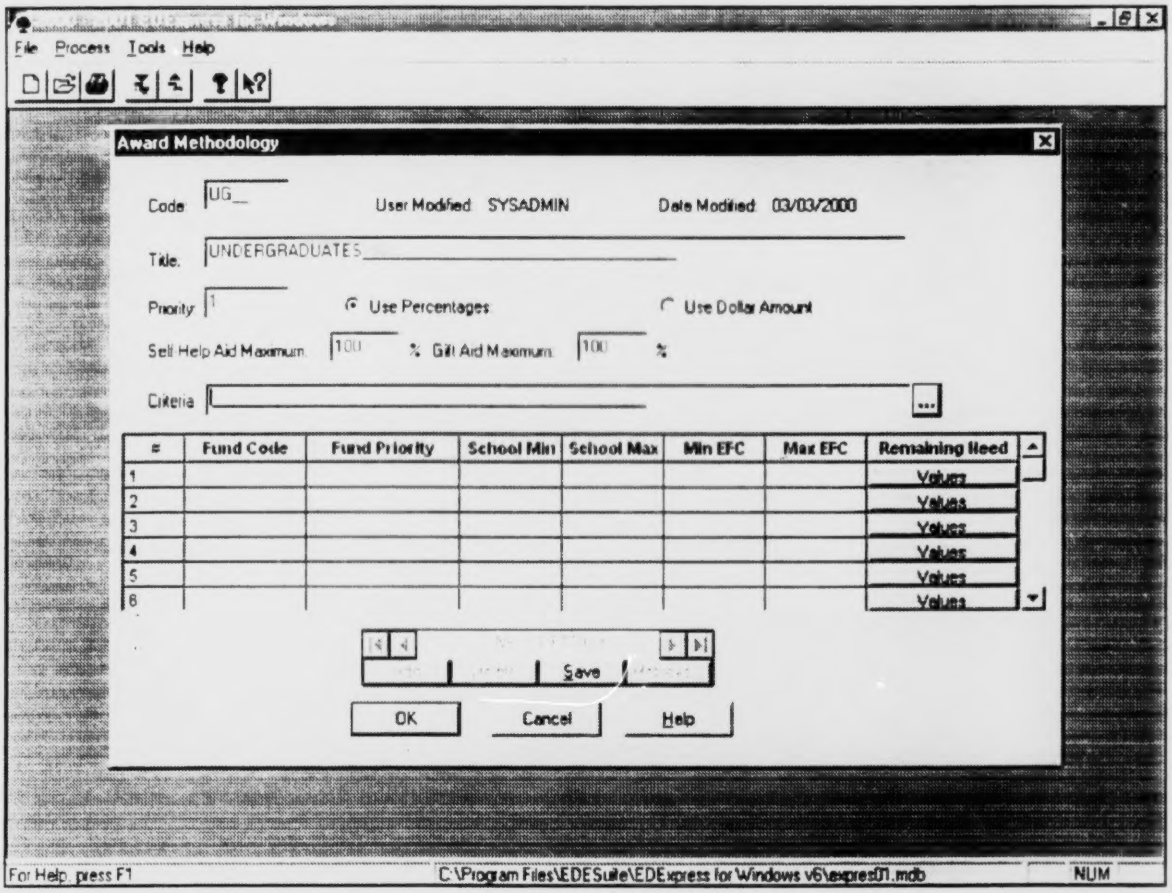
For Help, press F1
C:\PROGRAM FILES\EDESUITE\expres01.mdb
NUM

Keep the default value for ***Self-Help Aid Maximum*** *at 100%*

Also keep the default value for ***Gift Aid Maximum*** *at 100%*

In this example, we don't want to limit the percentage of either self-help or gift aid that can be packaged to satisfy unmet need

Note: *If you select Use Percentages, the default value for Self-Help Aid Maximum and Gift Aid Maximum is 100%*



Code: UG__
User Modified: SYSADMIN
Date Modified: 03/03/2000
Title: UNDERGRADUATES
Priority: 1
● Use Percentages
○ Use Dollar Amount
Self Help Aid Maximum: 100 %
Gift Aid Maximum: 100 %
Criteria:

#	Fund Code	Fund Priority	School Min	School Max	Min EFC	Max EFC	Remaining Need
1							Values
2							Values
3							Values
4							Values
5							Values
6							Values

For Help, press F1
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Let's look at an example of how the system allocates self-help and gift aid when the maximum percentage is invoked. In this example, self-help aid is limited to 40%, and gift aid is limited to 50% (Note that Pell is applied as gift aid.)

COA = $8,000	EFC = 2200	Unmet Need = $5,800
Gift Aid limited @ 50%		$5,800 X 50% = $2,900
Self-Help Aid limited @ 40%		$5,800 X 40% = $2,320

Award Methodology Funds	Funds Priority	Award Range	Gift Aid Award Amount	Self-Help Aid Award Amount	Remaining Need
Pell	1	0-3300	1050		4750
Grant 1	2	500-2000	1850		2900
Work 1	3	1000-2000		2000	900
Loan 1	4	200-2600		320	580
Grant 2	5	500-1000	0		580

Here's another example that illustrates how the system allocates self-help and gift aid using maximum dollars amounts. (Note that Pell is applied as gift aid.)

COA = $10,000	EFC = 1300	Unmet Need = $8,700
Gift Aid maximum @ $4,000		
Self-Help Aid maximum @ 4,000		

Award Methodology Funds	Funds Priority	Award Range	Gift Aid Award Amount	Self-Help Aid Award Amount	Remaining Need
Pell	1	0-3300	1950		6750
Grant 1	2	500-2000	2000		4750
Work 1	3	1000-2000		2000	2750
Loan 1	4	200-2600		2000	750
Grant 2	5	500-1000	50		700

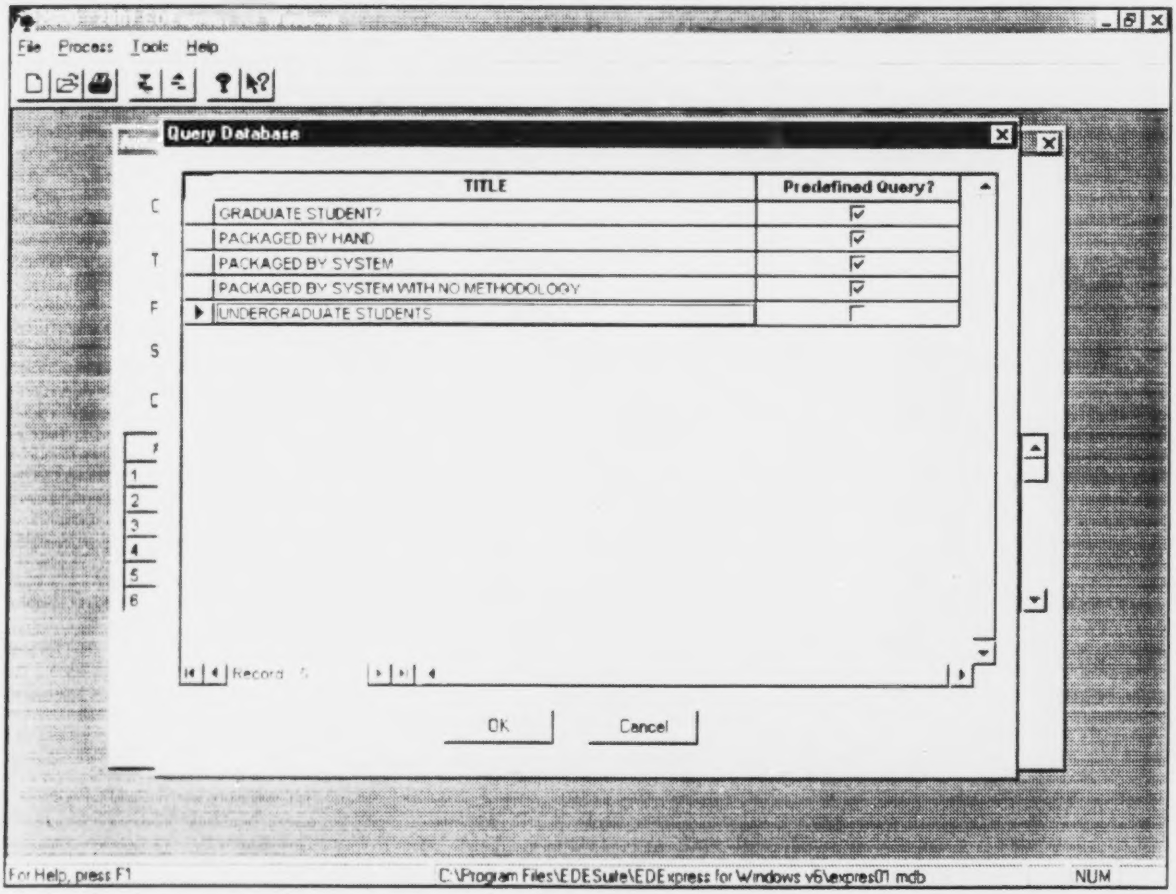
Note: If a student's remaining need (e.g., 250) is less than the minimum award amount you set for a particular fund (e.g., 500), the student will not be awarded from this fund despite having remaining need.

*Click the **Criteria** ellipsis button to display the list of available queries and identify the one you want tied to this award methodology*

*Highlight the desired query title, and click **OK***

The query in this example is created in the Packaging module and selects all undergraduate students

Tip: You may want to define one award methodology that does not use any selection criteria, so that every record can be packaged, even if no funds are awarded. To establish a methodology without using selection criteria, skip this field

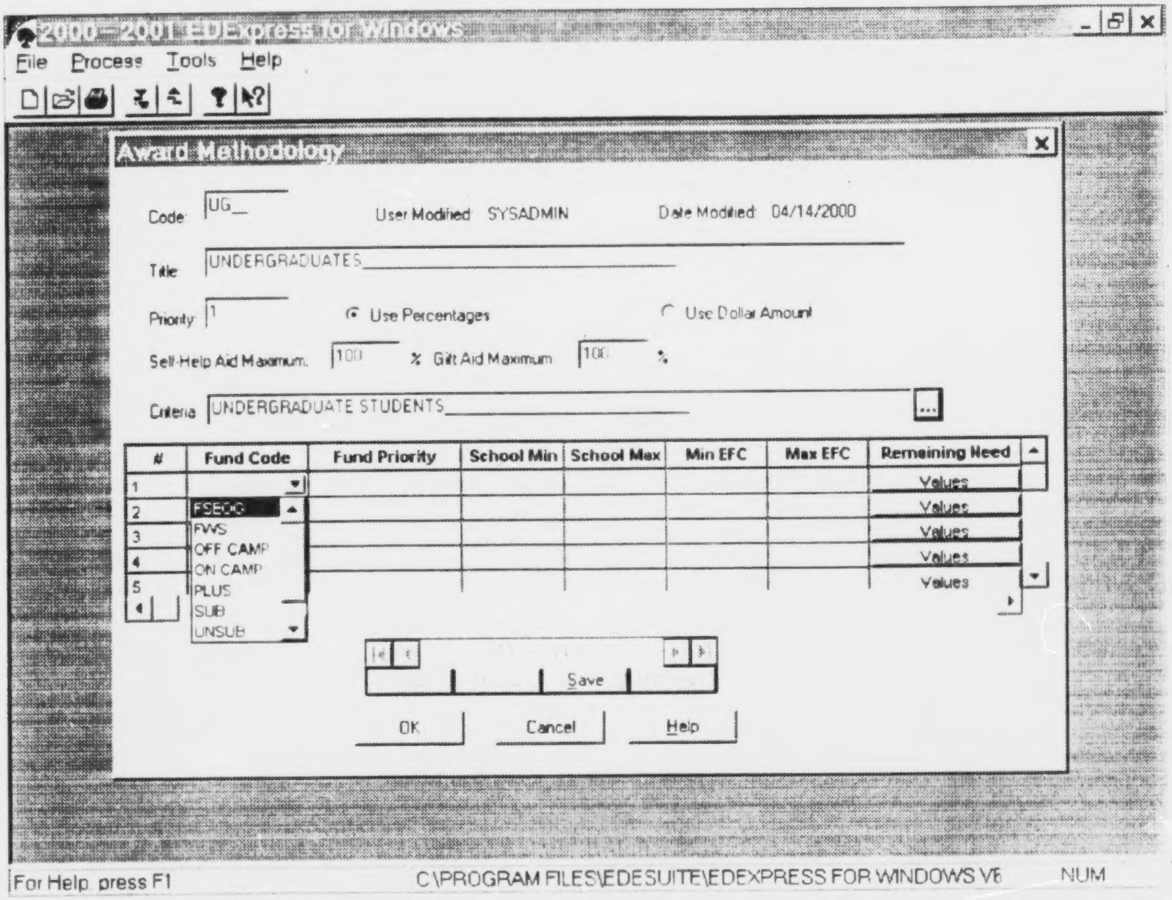

File
Process
Tools
Help
Query Database
Record
OK
Cancel
For Help, press F1
C:\Program Files\EDESuite\EDExpress for Windows v6\expres01.mdb
NUM

TITLE	Predefined Query?
GRADUATE STUDENT?	☑
PACKAGED BY HAND	☑
PACKAGED BY SYSTEM	☑
PACKAGED BY SYSTEM WITH NO METHODOLOGY	☑
UNDERGRADUATE STUDENTS	☐

Note: Although a fund for Pell has been created, the Federal Pell Grant does not display in the Fund Code field as an option. Eligible recipients automatically receive the correct amount based on the academic year profile.

Click the ***Fund Code*** *down arrow to display a list of valid fund codes for funds you already set up in Fund Maintenance.*

Then, select the Fund you want.


2000–2001 EDExpress for Windows
File
Process
Tools
Help
Award Methodology
Save
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

Code: UG

User Modified: SYSADMIN

Date Modified: 04/14/2000

Title: UNDERGRADUATES

Priority: 1

● Use Percentages ○ Use Dollar Amount

Self-Help Aid Maximum: 100 % Gift Aid Maximum: 100 %

Criteria: UNDERGRADUATE STUDENTS

#	Fund Code	Fund Priority	School Min	School Max	Min EFC	Max EFC	Remaining Need
1							Values
2	FSEOG						Values
3	FWS						Values
4	OFF CAMP						Values
5	ON CAMP						Values
	PLUS						
	SUB						
	UNSUB						

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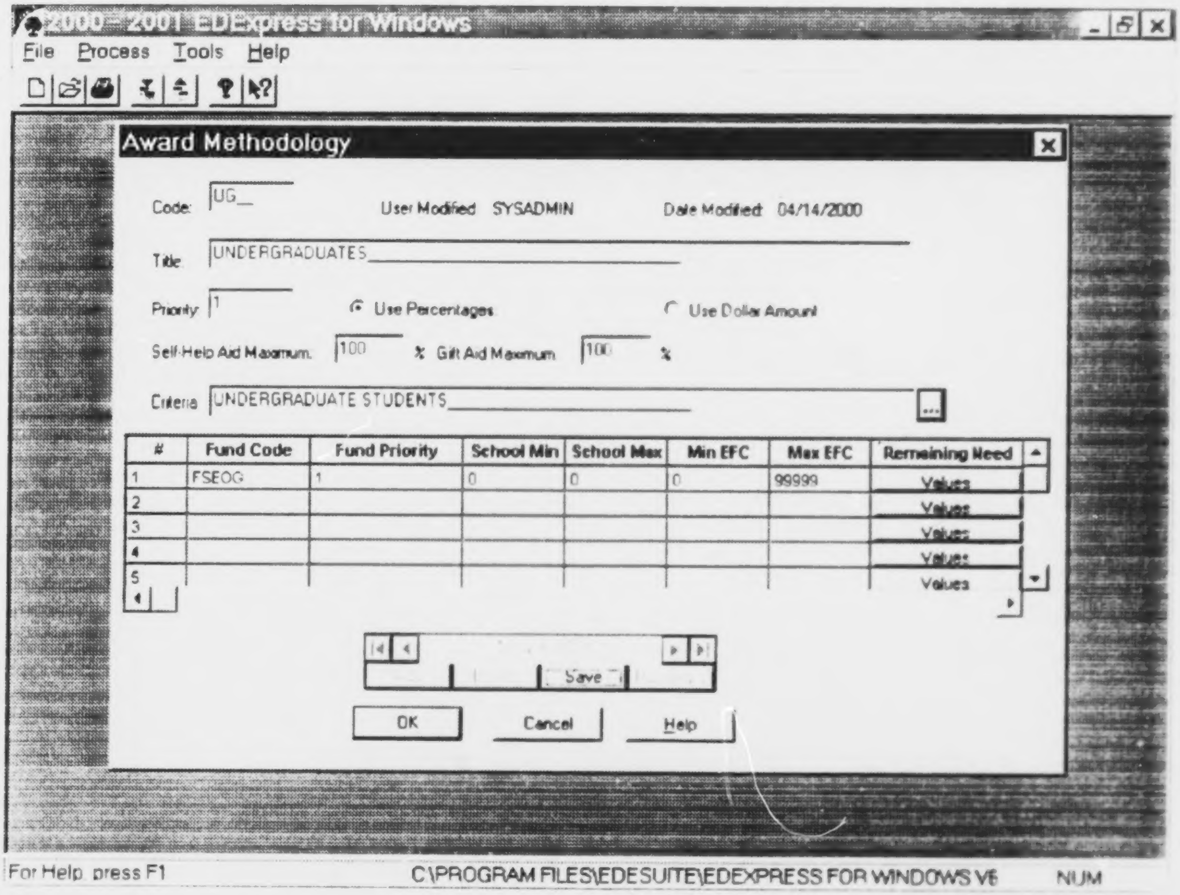
Enter the ***Fund Priority*** *number*

Notice that after the priority number is entered, the remaining fields are populated with system default values

The fund priority is the order in which funds are awarded within this award methodology. In this case, we want to award the state need-based grant first, so we enter 1.


2000–2001 EDExpress for Windows
File
Process
Tools
Help
Award Methodology
OK
Cancel
Help
Save

Code: UG

User Modified: SYSADMIN

Date Modified: 04/14/2000

Title: UNDERGRADUATES

Priority: 1

● Use Percentages ○ Use Dollar Amount

Self-Help Aid Maximum: 100 %

Gift Aid Maximum: 100 %

Criteria: UNDERGRADUATE STUDENTS

#	Fund Code	Fund Priority	School Min	School Max	Min EFC	Max EFC	Remaining Need
1	FSEOG	1	0	0	0	99999	Values
2							Values
3							Values
4							Values
5							Values

For Help, press F1

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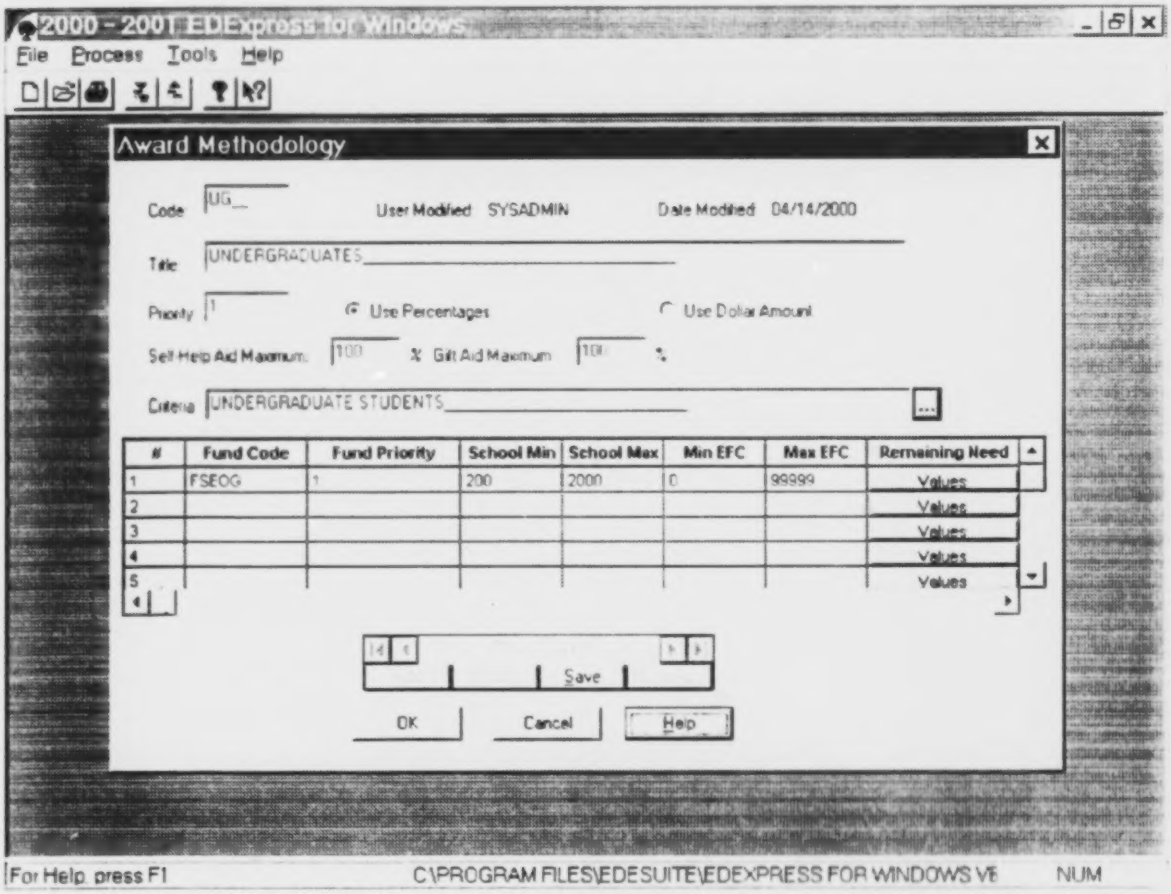
NUM

For each fund in the award methodology, you can set minimum and maximum amounts to be packaged per eligible student. Unless you enter amounts, the system will award varying amounts based on the student's unmet need. Valid amounts are 0 to 99999.

*For **School Min** and **School Max**, enter the minimum and maximum award amounts.*

***Note:** If a student's remaining need is less than the minimum award amount you designate, the system ignores this particular fund when packaging the student based on this methodology.*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Award Methodology
Save
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

Code: UG

User Modified: SYSADMIN

Date Modified: 04/14/2000

Title: UNDERGRADUATES

Priority: 1

● Use Percentages ○ Use Dollar Amount

Self Help Aid Maximum: 100 %

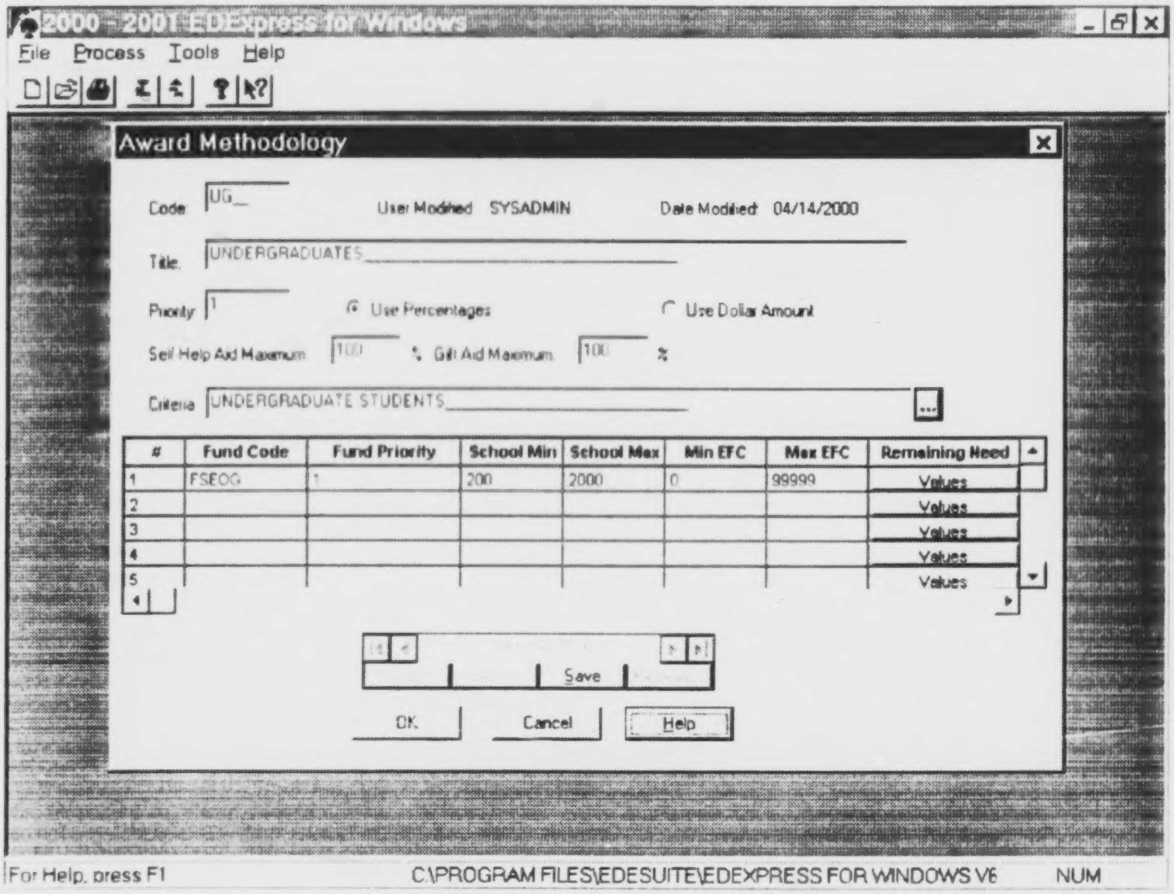
Gift Aid Maximum: 100 %

Criteria: UNDERGRADUATE STUDENTS

#	Fund Code	Fund Priority	School Min	School Max	Min EFC	Max EFC	Remaining Need
1	FSEOG	1	200	2000	0	99999	Values
2							Values
3							Values
4							Values
5							Values

*For **Min EFC** and **Max EFC**, enter the minimum and maximum EFC values to package the fund based on this award methodology*

Because in this example the FSEOG fund already includes criteria that selects students with EFCs no greater than 500, we don't need to set a value for Max EFC.


2000 - 2001 EDExpress for Windows
File Process Tools Help
Award Methodology
Save
OK
Cancel
Help

Code: UG

User Modified: SYSADMIN

Date Modified: 04/14/2000

Title: UNDERGRADUATES

Priority: 1

● Use Percentages ○ Use Dollar Amount

Self Help Aid Maximum: 100 %

Gift Aid Maximum: 100 %

Criteria: UNDERGRADUATE STUDENTS

#	Fund Code	Fund Priority	School Min	School Max	Min EFC	Max EFC	Remaining Need
1	FSEOG	1	200	2000	0	99999	Values
2							Values
3							Values
4							Values
5							Values

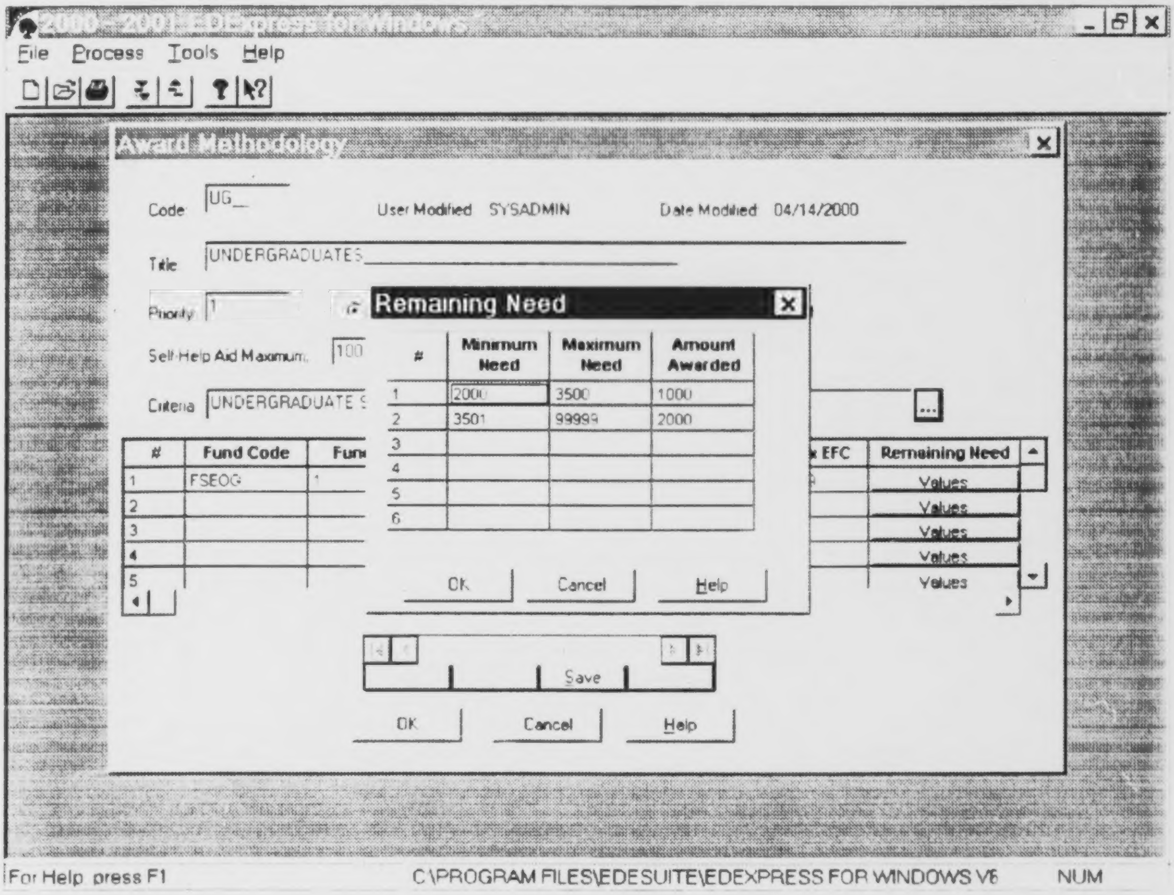
For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6 NUM

The last field to consider is Remaining Need. This field allows you to set or update additional parameters that the system checks against when packaging the fund. Based on the values entered, each fund can be packaged in varying amounts based on up to 6 levels of remaining need.

A separate Remaining Need option was available when you set up the fund. Any values you entered under Fund Maintenance defaults to this award methodology screen. You may leave them as they are or update them. When packaging, the system defaults to the Remaining Need values you update in the Award Methodology and ignores those you entered under Fund Maintenance.

Click the ***Values*** *field to display the Remaining Need values set when the fund was created.*

Update as needed, then click ***OK***


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Award Methodology
OK
Cancel
Help
Save
OK
Cancel
Help
For Help press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

Code: UG

User Modified: SYSADMIN

Date Modified: 04/14/2000

Title: UNDERGRADUATES

Priority: 1

Self-Help Aid Maximum: 100

Criteria: UNDERGRADUATE S

Remaining Need

#	Minimum Need	Maximum Need	Amount Awarded
1	2000	3500	1000
2	3501	99999	2000
3			
4			
5			
6			

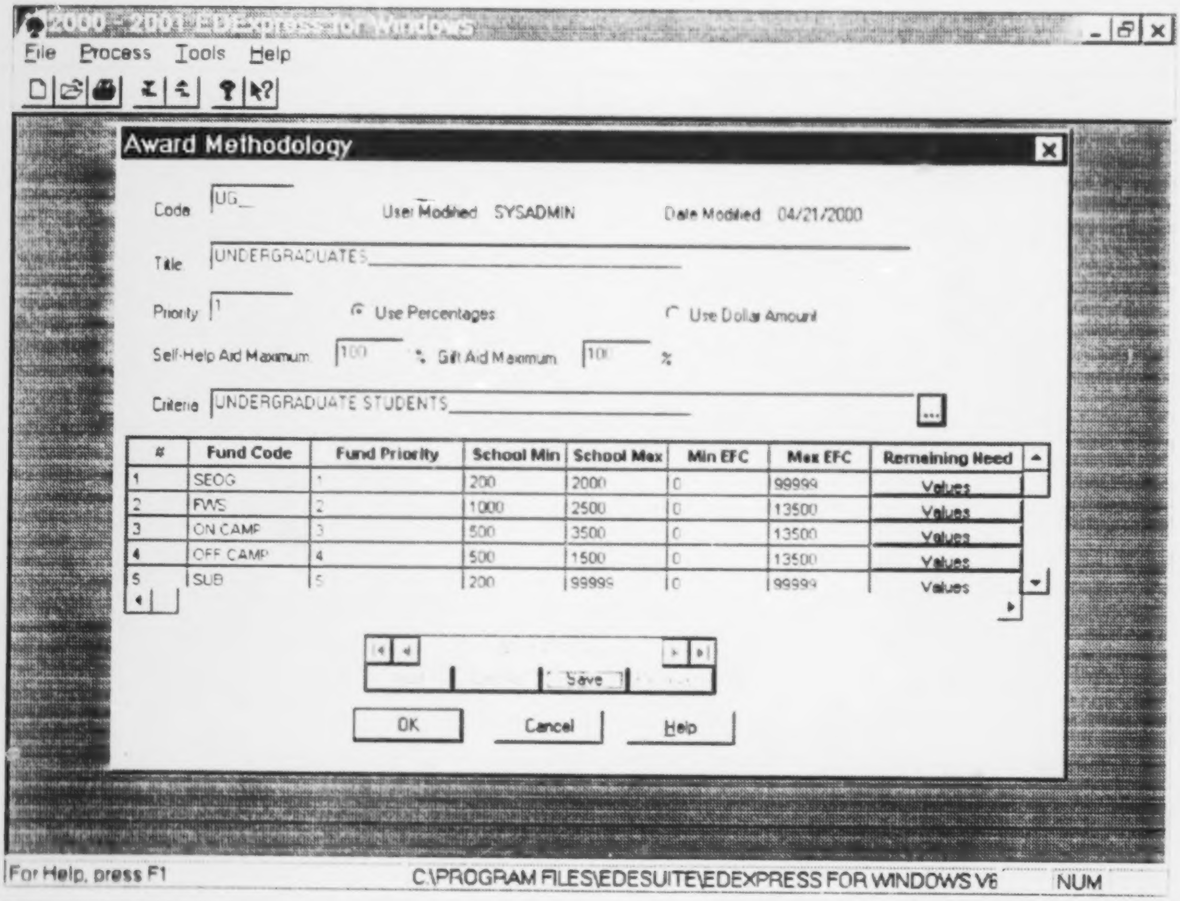
#	Fund Code	Fun	x EFC	Remaining Need
1	FSEOG			Values
2				Values
3				Values
4				Values
5				Values

Continue adding funds until completed

To save the record click ***Save***

Award methodologies may include up to twenty funds, including Pell. Therefore, if your school participates in the Pell Grant program, you may enter up to 19 fund codes for each methodology you create.

Remember: *You can include only funds that have been previously established under Fund Maintenance.*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Award Methodology
Use Percentages
Use Dollar Amount
Save
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

Code UG
User Modified SYSADMIN
Date Modified 04/21/2000
Title UNDERGRADUATES
Priority 1
● Use Percentages ○ Use Dollar Amount
Self-Help Aid Maximum 100 %
Gift Aid Maximum 100 %
Criteria UNDERGRADUATE STUDENTS

#	Fund Code	Fund Priority	School Min	School Max	Min EFC	Max EFC	Remaining Need
1	SEOG	1	200	2000	0	99999	Values
2	FWS	2	1000	2500	0	13500	Values
3	ON CAMP	3	500	3500	0	13500	Values
4	OFF CAMP	4	500	1500	0	13500	Values
5	SUB	5	200	99999	0	99999	Values

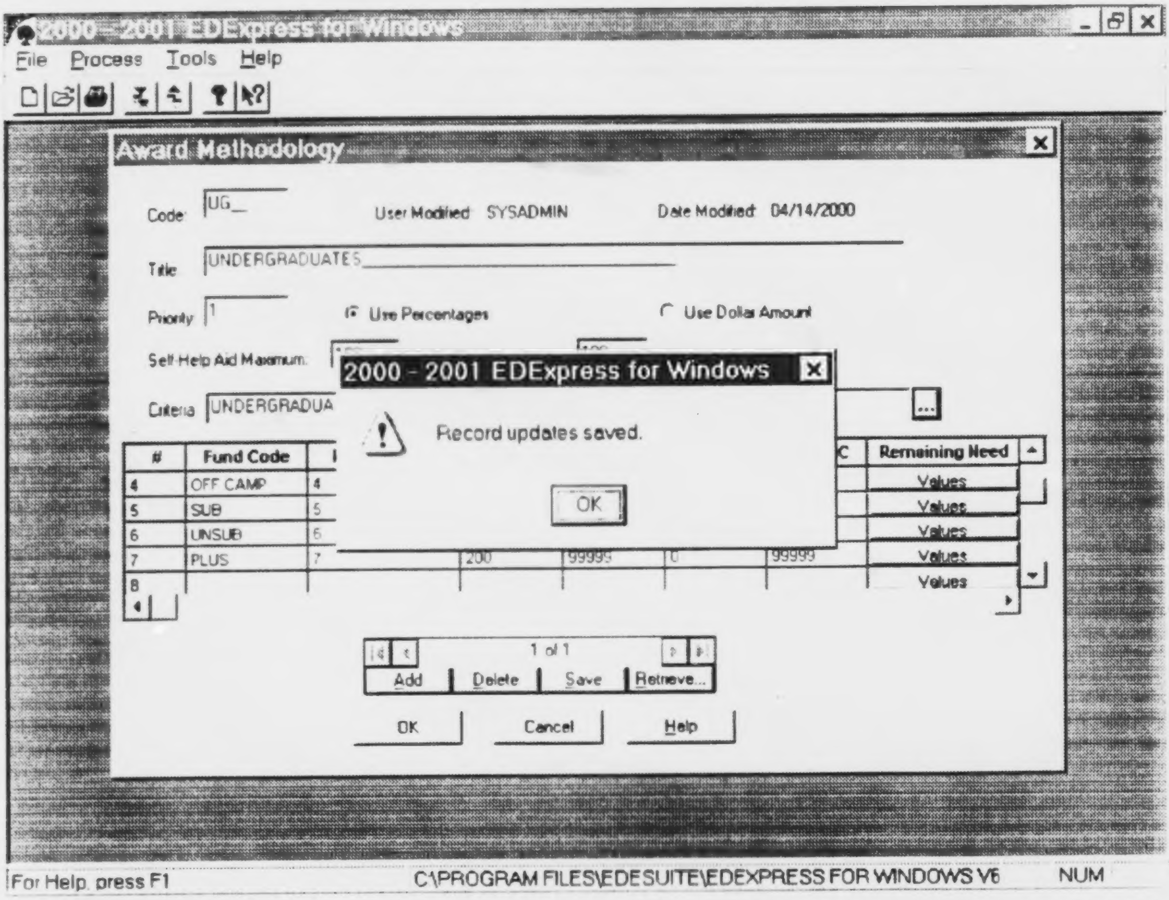
Remember: *Fund codes can be listed more than one time within the same methodology*

A Record Updates Saved dialog box displays

Click ***OK***

Click ***Add*** *to continue entering award methodologies*

Otherwise, click ***OK*** *or* ***Cancel*** *to exit*


2000 - 2001 EDExpress for Windows
File Process Tools Help
Award Methodology
1 of 1
Add Delete Save Retrieve...
OK Cancel Help

Code: UG_
User Modified: SYSADMIN
Date Modified: 04/14/2000
Title: UNDERGRADUATES
Priority: 1
● Use Percentages
○ Use Dollar Amount
Self-Help Aid Maximum:
Criteria: UNDERGRADUA

#	Fund Code					C	Remaining Need
4	OFF CAMP	4					Values
5	SUB	5					Values
6	UNSUB	6					Values
7	PLUS	7	200	99999	0	99999	Values
8							Values

2000 - 2001 EDExpress for Windows

Record updates saved.

OK

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6 NUM

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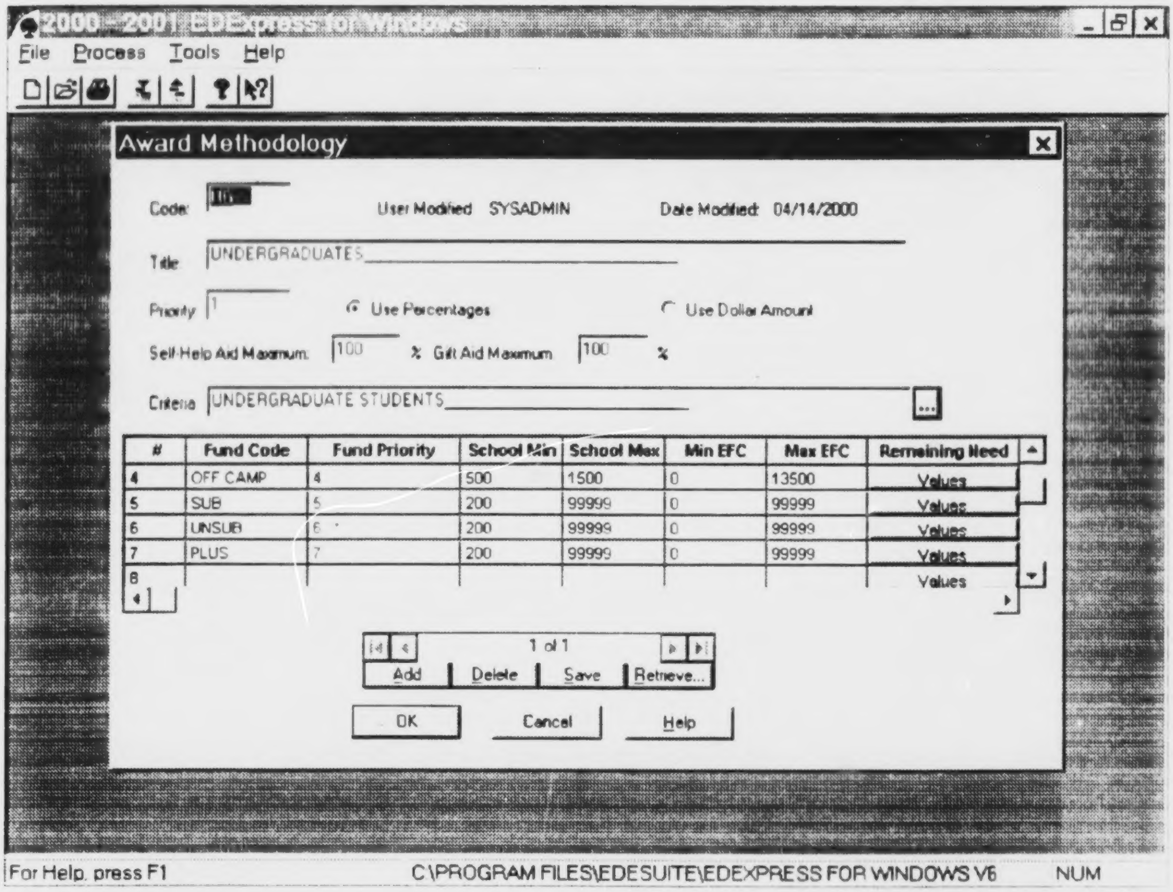
This is the completed Award Methodology record, which includes a total of 7 funds

Remember: *To have the software correctly award the maximum statutory limits for Federal Subsidized, Unsubsidized, and PLUS loans, you must set the maximum award values at 99999*

In addition, so that the system doesn't award loans below the FFEL statutory minimum to students with remaining need below 200, you must set the minimum loan award amounts at 200

Note: *The system does not package PLUS funds for independent students*


2000 - 2001 EDExpress for Windows
File Process Tools Help
Award Methodology

Code: [illegible]
User Modified SYSADMIN
Date Modified: 04/14/2000
Title UNDERGRADUATES
Priority 1
● Use Percentages
○ Use Dollar Amount
Self-Help Aid Maximum 100 %
Gift Aid Maximum 100 %
Criteria UNDERGRADUATE STUDENTS

#	Fund Code	Fund Priority	School Min	School Max	Min EFC	Max EFC	Remaining Need
4	OFF CAMP	4	500	1500	0	13500	Values
5	SUB	5	200	99999	0	99999	Values
6	UNSUB	6	200	99999	0	99999	Values
7	PLUS	7	200	99999	0	99999	Values
8							Values

1 of 1
Add
Delete
Save
Retrieve...
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

Apply What You Learned

Completing an Award Methodology Worksheet

Before entering data into the software to set up an Award Methodology, let's prepare an Award Methodology Worksheet along with any other worksheets that are needed.

In this scenario, the award methodology is for high-need, dependent undergraduate students who have EFCs below 501. The funds included are:

- SEOG (page 2-133)
- FWS
- Perkins loan
- Need-based institutional grant called WTBCC Grant
- Subsidized loan
- PLUS loan

1. Before completing the Award Methodology Worksheet, complete Fund Maintenance Worksheets for each fund other than SEOG. Use codes and descriptions that help you easily identify the funds.
    - For FWS, include a Beginning Balance of $200,000 and skip over the Remaining Need option.
    - For the institutional need-based grant, set at least one level of remaining need as you see fit.
    - For the Perkins Loan, include a Beginning Balance of $125,000 and Remaining Need to award 1,000 for a need range of 5000 to 8000 and to award 2,000 for a need range of 8001 to 99999.
2. Complete a Query Worksheet to construct a new query that identifies dependent undergraduate students with EFCs below 501. Name the query Undergraduates (Dependent), EFC<501.
3. Complete the Award Methodology Worksheet using the following guidelines.
    - Assign any code and description you choose and a priority of 1.
    - Fix the maximums for self-help and gift aid using percentages—100% for self-help and 80% for gift aid.
    - The priority of the funds should match the order listed above.
    - Use your own judgment to enter values in the other remaining fields.

Fund Maintenance Worksheet

1. Enter up to eight characters to create a free-form **Fund Code**. _ _ _ _ _ _ _ _

2. Enter up to 25 characters to create a free-form **Fund Description**. _

3. Select an **Aid Type** from below.

E = FSEOG
F = Pell
G = Any Grant or Scholarship
K = Perkins
L = Other Need-Based Loan
N = Non Need-Based Loan
O = Outside Resources
P = PLUS
S = Subsidized Stafford
U = Unsubsidized Stafford
W = Federal Work-Study
Y = Other Work-Study

4. Enter the **Beginning Fund Balance**. $

Awards are automatically subtracted from the Beginning Balance. Current (balance) plus Awarded (balance) should equal Beginning Balance (if Adjustments are 0).

5. Enter an **Adjustment** to increase or decrease the Beginning Balance after the initial awarding of the fund. $

6. Enter parameters to award this fund based on **Remaining Need** (optional). Does not apply to Fund Types F, O, P, S, U.

#	Minimum Need	Maximum Need	Amount to Award
1			
2			
3			
4			
5			
6			

7. Select the **Packaging Criteria** (optional). Queries match student records with criteria you specify for awarding the fund. For example, Work-Study awards can be limited to students who answered "Yes" on the FAFSA question about the student's interest in Work Study aid. This selection criteria works in addition to the Award Methodology.

Fund Maintenance Worksheet

1. Enter up to eight characters to create a free-form **Fund Code**. _ _ _ _ _ _ _ _

2. Enter up to 25 characters to create a free-form **Fund Description**. _

3. Select an **Aid Type** from below.

E = FSEOG
F = Pell
G = Any Grant or Scholarship
K = Perkins
L = Other Need-Based Loan
N = Non Need-Based Loan
O = Outside Resources
P = PLUS
S = Subsidized Stafford
U = Unsubsidized Stafford
W = Federal Work-Study
Y = Other Work-Study

4. Enter the **Beginning Fund Balance**. $

Awards are automatically subtracted from the Beginning Balance. Current (balance) plus Awarded (balance) should equal Beginning Balance (if Adjustments are 0).

5. Enter an **Adjustment** to increase or decrease the Beginning Balance after the initial awarding of the fund. $

6. Enter parameters to award this fund based on **Remaining Need** (optional). Does not apply to Fund Types F, O, P, S, U.

#	Minimum Need	Maximum Need	Amount to Award
1			
2			
3			
4			
5			
6			

7. Select the **Packaging Criteria** (optional). Queries match student records with criteria you specify for awarding the fund. For example, Work-Study awards can be limited to students who answered "Yes" on the FAFSA question about the student's interest in Work Study aid. This selection criteria works in addition to the Award Methodology.

Fund Maintenance Worksheet

1. Enter up to eight characters to create a free-form **Fund Code**.	_ _ _ _ _ _ _ _
2. Enter up to 25 characters to create a free-form **Fund Description**.	_ _
3. Select an **Aid Type** from below.	

E = FSEOG
F = Pell
G = Any Grant or Scholarship
K = Perkins
L = Other Need-Based Loan
N = Non Need-Based Loan
O = Outside Resources
P = PLUS
S = Subsidized Stafford
U = Unsubsidized Stafford
W = Federal Work-Study
Y = Other Work-Study

4. Enter the **Beginning Fund Balance**.	$

Awards are automatically subtracted from the Beginning Balance. Current (balance) plus Awarded (balance) should equal Beginning Balance (if Adjustments are 0).

5. Enter an **Adjustment** to increase or decrease the Beginning Balance after the initial awarding of the fund.	$

6. Enter parameters to award this fund based on **Remaining Need** (optional).
Does not apply to Fund Types F, O, P, S, U.

#	Minimum Need	Maximum Need	Amount to Award
1			
2			
3			
4			
5			
6			

7. Select the **Packaging Criteria** (optional). Queries match student records with criteria you specify for awarding the fund. For example, Work-Study awards can be limited to students who answered "Yes" on the FAFSA question about the student's interest in Work Study aid. This selection criteria works in addition to the Award Methodology.	

Fund Maintenance Worksheet

1. Enter up to eight characters to create a free-form **Fund Code**. _ _ _ _ _ _ _ _

2. Enter up to 25 characters to create a free-form **Fund Description**. _

3. Select an **Aid Type** from below.

E = FSEOG	**L = Other Need-Based Loan**	**S = Subsidized Stafford**
F = Pell	**N = Non Need-Based Loan**	**U = Unsubsidized Stafford**
G = Any Grant or Scholarship	**O = Outside Resources**	**W = Federal Work-Study**
K = Perkins	**P = PLUS**	**Y = Other Work-Study**

4. Enter the **Beginning Fund Balance**. $

Awards are automatically subtracted from the Beginning Balance. Current (balance) plus Awarded (balance) should equal Beginning Balance (if Adjustments are 0).

5. Enter an **Adjustment** to increase or decrease the Beginning Balance after the initial awarding of the fund. $

6. Enter parameters to award this fund based on **Remaining Need** (optional). Does not apply to Fund Types F, O, P, S, U.

#	Minimum Need	Maximum Need	Amount to Award
1			
2			
3			
4			
5			
6			

7. Select the **Packaging Criteria** (optional). Queries match student records with criteria you specify for awarding the fund. For example, Work-Study awards can be limited to students who answered "Yes" on the FAFSA question about the student's interest in Work Study aid. This selection criteria works in addition to the Award Methodology.

Fund Maintenance Worksheet

1. Enter up to eight characters to create a free-form **Fund Code**. _ _ _ _ _ _ _ _

2. Enter up to 25 characters to create a free-form **Fund Description**. _

3. Select an **Aid Type** from below.

E = FSEOG
F = Pell
G = Any Grant or Scholarship
K = Perkins
L = Other Need-Based Loan
N = Non Need-Based Loan
O = Outside Resources
P = PLUS
S = Subsidized Stafford
U = Unsubsidized Stafford
W = Federal Work-Study
Y = Other Work-Study

4. Enter the **Beginning Fund Balance**. $

Awards are automatically subtracted from the Beginning Balance. Current (balance) plus Awarded (balance) should equal Beginning Balance (if Adjustments are 0).

5. Enter an **Adjustment** to increase or decrease the Beginning Balance after the initial awarding of the fund. $

6. Enter parameters to award this fund based on **Remaining Need** (optional). Does not apply to Fund Types F, O, P, S, U.

#	Minimum Need	Maximum Need	Amount to Award
1			
2			
3			
4			
5			
6			

7. Select the **Packaging Criteria** (optional). Queries match student records with criteria you specify for awarding the fund. For example, Work-Study awards can be limited to students who answered "Yes" on the FAFSA question about the student's interest in Work Study aid. This selection criteria works in addition to the Award Methodology.

Query Worksheet

What Task do You Want to Perform?	What Module is Available to Create the Query to Perform this Task?
	☐ Apps ☐ Global ☐ DL ☐ Packaging ☐ Pell

Enter a title for the Query that describes the group of students to be selected:

Data Element	Operators	Value
Enter the data field(s) from the Module indicated above	=, <>, <, >, >=, <=, like, not like	☐ Prompt at Execution (to create a parameter query) ☐ Enter free-form or system-assigned value
	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	

Award Methodology Worksheet

1. Establish up to a 4-character code to identify the award methodology: _ _ _ _

2. Enter up to 50 characters to create a free-form description of the award methodology:

3. Establish a 3-character priority number for this award methodology. If a student is selected for more than one methodology, the highest priority methodology is applied. _ _ _

4. For Aid Maximums use: ☐ Percentages ☐ Dollar Amounts

5. The maximum percentage or dollar amount of the total award package that is awarded as self-help aid, either work-study or loans.

6. The maximum percentage or dollar amount of the total award package that can be awarded as gift aid.

7. Select a Query that is used to select the group of students for this funding package (optional).

8. Establish award parameters for up to 20 specific funds (Pell Grant is hard coded and therefore not entered on this table).

Identify fund to award	Identify priority of award	Identify minimum award	Identify maximum award	Identify minimum EFC to make award	Identify maximum EFC to make award	Refer to supplemental worksheet*
Fund Code	**Priority**	**Minimum $**	**Maximum $**	**Minimum EFC**	**Maximum EFC**	**Remaining Need**

*Award Methodology Remaining Need Worksheet

Fund Code:

#	Minimum Need	Maximum Need	Amount to Award
1			
2			
3			
4			
5			
6			

Fund Code:

#	Minimum Need	Maximum Need	Amount to Award
1			
2			
3			
4			
5			
6			

Fund Code:

#	Minimum Need	Maximum Need	Amount to Award
1			
2			
3			
4			
5			
6			

Fund Code:

#	Minimum Need	Maximum Need	Amount to Award
1			
2			
3			
4			
5			
6			

Fund Code:

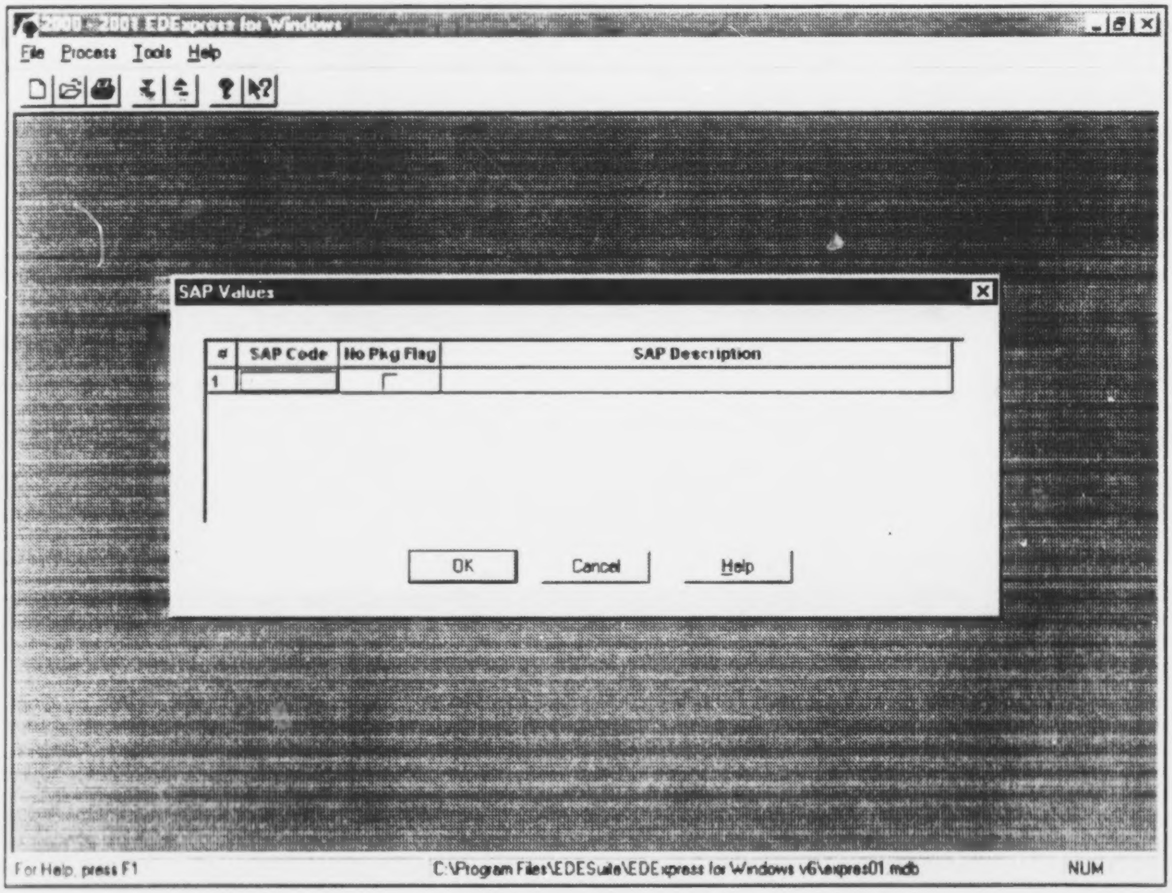
#	Minimum Need	Maximum Need	Amount to Award
1			
2			
3			
4			
5			
6			

Satisfactory Academic Progress (SAP) Values

Another setup function in EDExpress is Satisfactory Academic Progress (SAP). SAP values allow you to record the academic progress of your students based on your school's SAP policy. Associated with codes you create, a flag can be set to interrupt the packaging process for students not making satisfactory academic progress.

The components in setting up SAP values or codes include:

- SAP Code
- No Packaging Flag
- SAP Description


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
SAP Values
#
SAP Code
No Pkg Flag
SAP Description
1
OK
Cancel
Help
For Help, press F1
C:\Program Files\EDESuite\EDExpress for Windows v6\expres01.mdb
NUM

SAP Code

You can create an unlimited number of unique Satisfactory Academic Progress (SAP) codes or values. In this field, enter up to two alphanumeric characters.

No Packaging Flag

This field is optional. Selecting this flag prevents the student's record from being packaged as long as this particular SAP code is assigned to the student.

SAP Description

The SAP description is the title you assign to this SAP value. The description can consist of up to 50 alphanumeric characters.

[Slide 2-38]

Tips about SAP Records

- You can modify or delete an SAP record as long as no student records are assigned that code.
- You might choose to assign SAP values to all student Packaging records or perhaps only to those students who have non-satisfactory codes that prevent packaging.
- You can use the multiple entry function of EDExpress to update SAP values for groups of students at one time by using a query created in the Packaging module, by entering a group of Social Security Numbers, or by importing a file of Social Security Numbers.
- You can create SAP codes for tracking purposes other than satisfactory academic progress. For example, you could create codes that prevent automatic packaging for students who need to submit FATs or who have not/will not file the FAFSA.

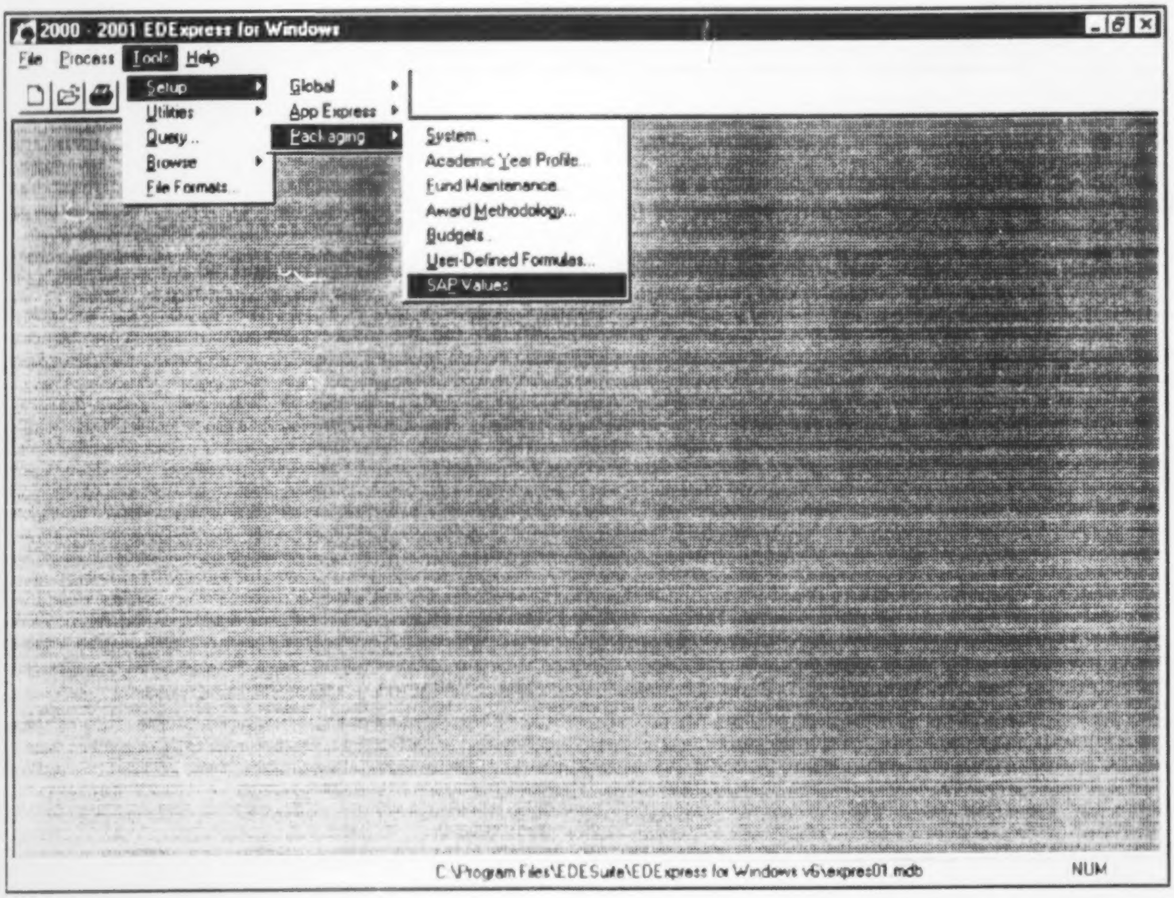
[Slide 2-39]

Creating an SAP Value

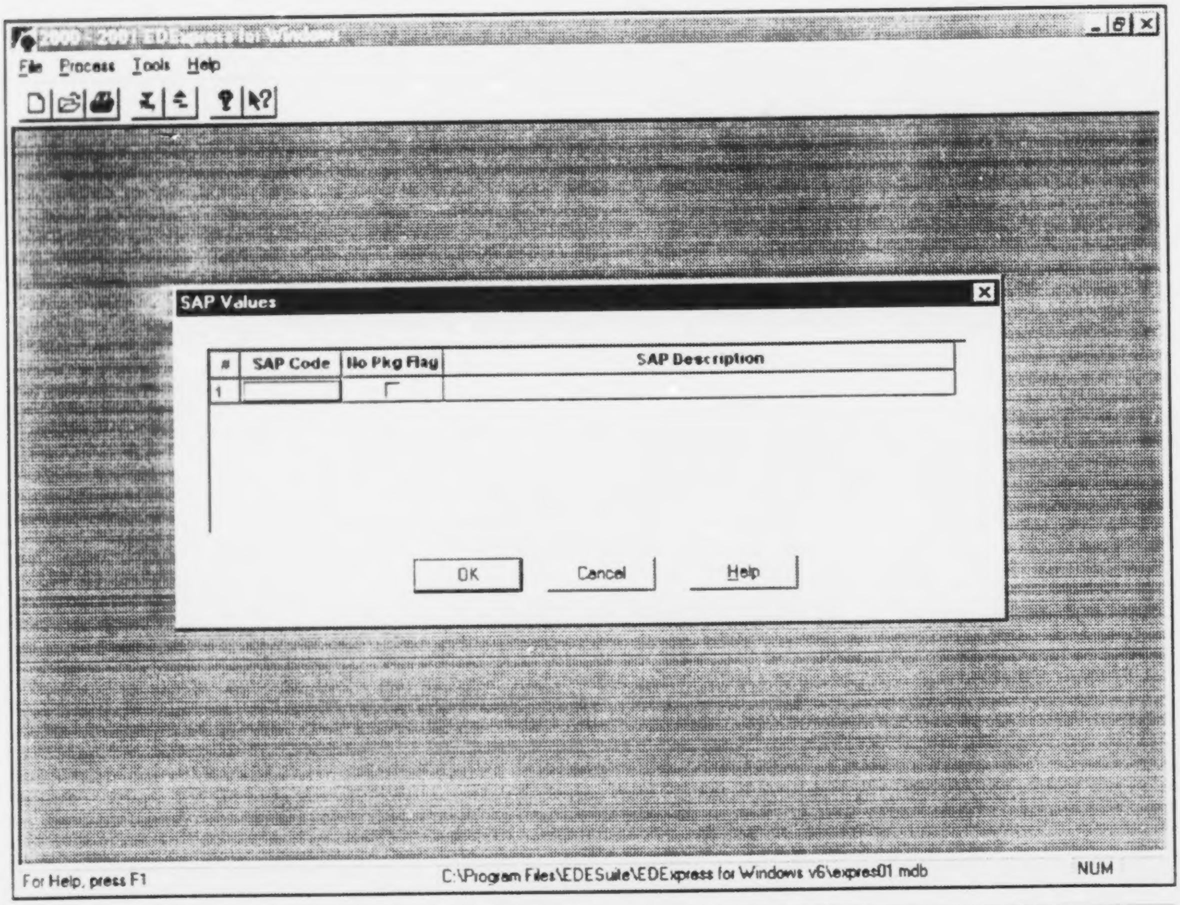
To create an SAP value or record

Select ***Tools/Setup/ Packaging/SAP Values*** *from the main menu*

Remember: *This setup is optional*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Setup
Utilities
Query...
Browse
File Formats...
Global
App Express
Packaging
System...
Academic Year Profile...
Fund Maintenance...
Award Methodology...
Budgets...
User-Defined Formulas...
SAP Values
C:\Program Files\EDESuite\EDExpress for Windows v6\expres01.mdb
NUM

The SAP Values dialog box displays

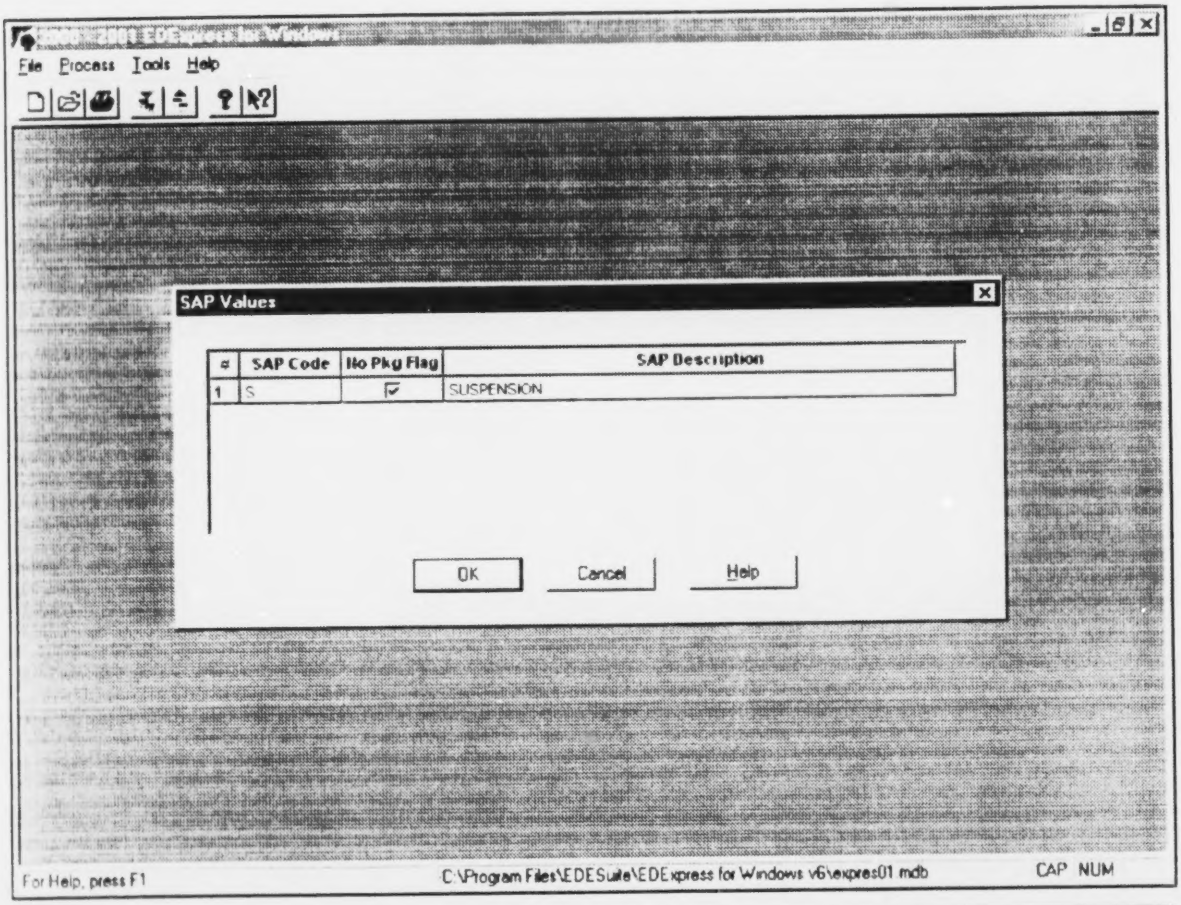

2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
SAP Values
OK
Cancel
Help
For Help, press F1
C:\Program Files\EDESuite\EDExpress for Windows v6\expres01.mdb
NUM

#	SAP Code	No Pkg Flag	SAP Description
1		☐	

*Enter the **SAP Code** (up to 2 alphanumeric characters)*

*To prevent student records with this code from packaging, check the **No Pkg Flag** box*

*Enter the **SAP Description** (up to 50 alphanumeric characters)*


2000-2001 EDExpress for Windows
File
Process
Tools
Help
SAP Values
OK
Cancel
Help
For Help, press F1
CAP
NUM

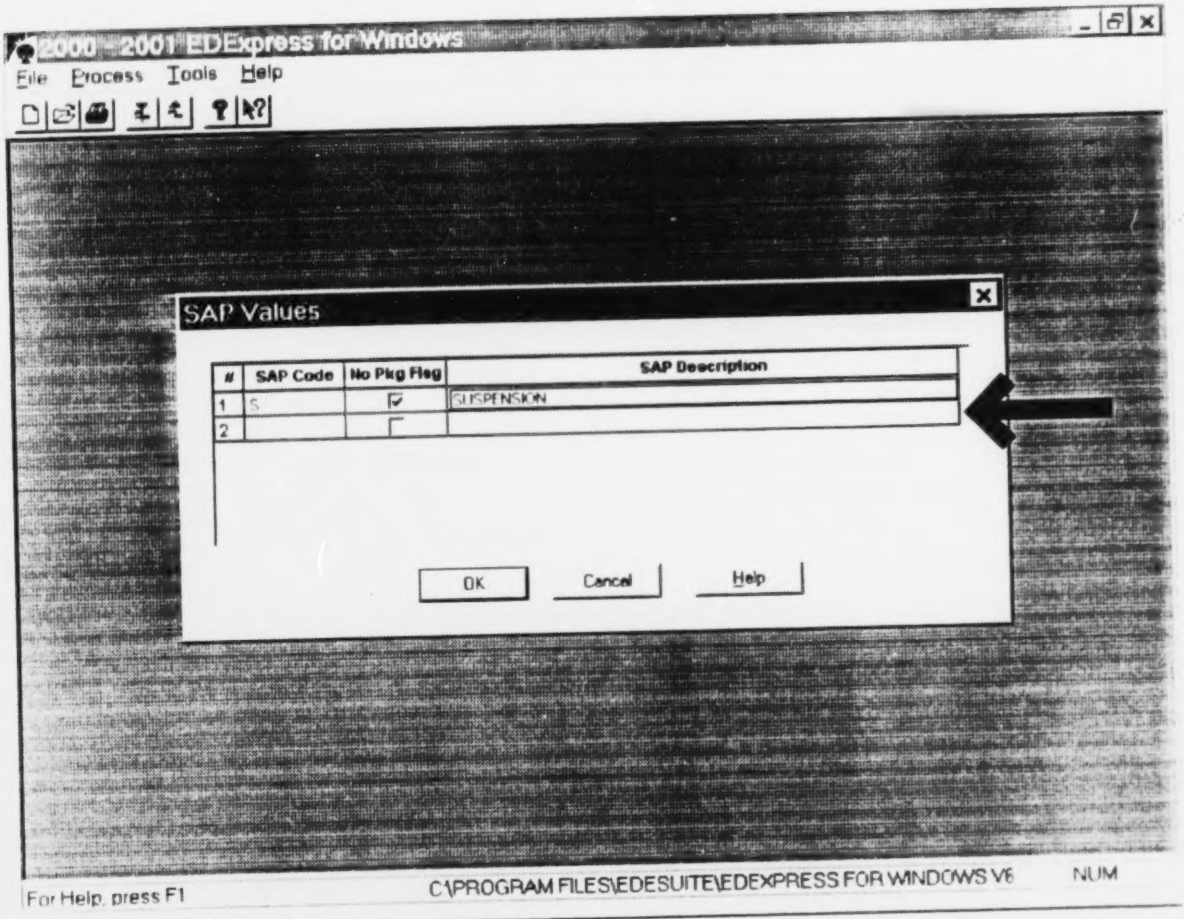
#	SAP Code	No Pkg Flag	SAP Description
1	S	☑	SUSPENSION

C:\Program Files\EDESuite\EDExpress for Windows v6\expres01.mdb

To create more SAP records

Enter or return after typing the SAP Description A blank row displays

Repeat the process until you're done entering all the SAP records needed

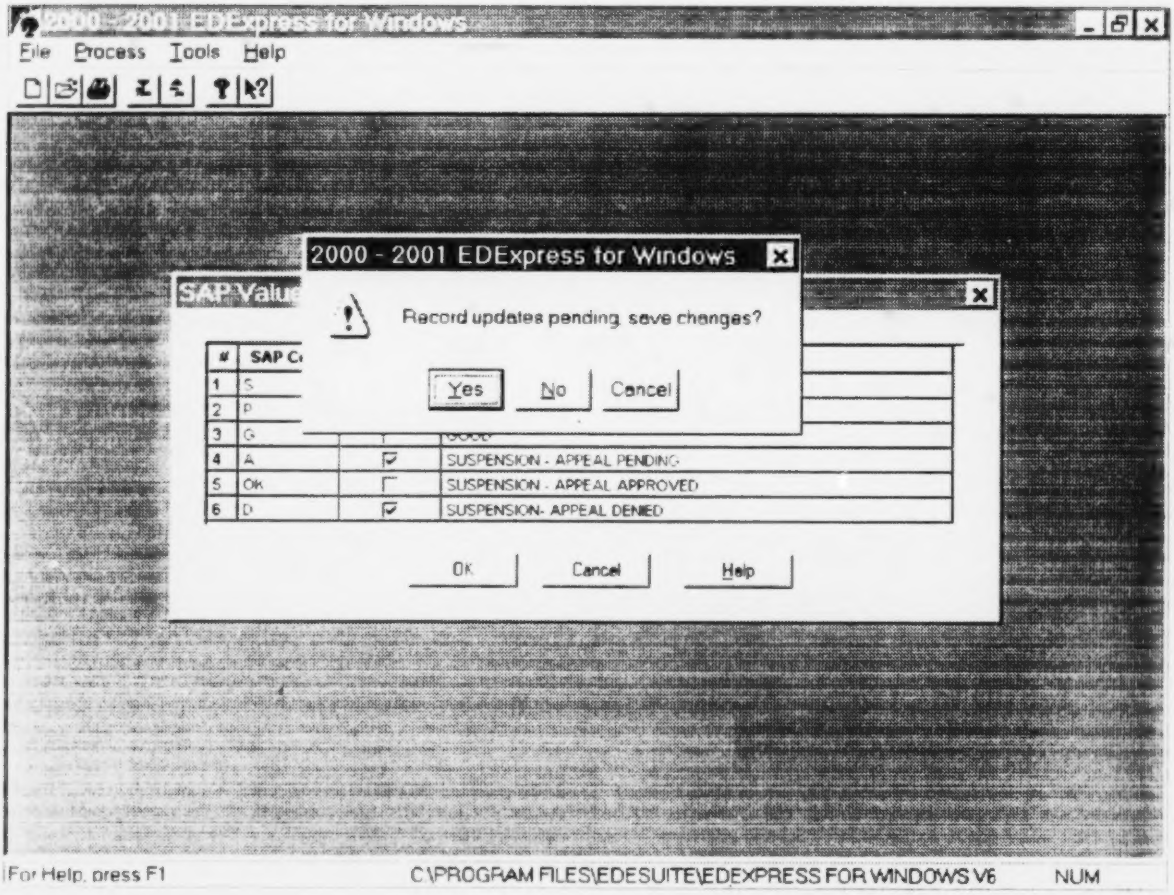

2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
SAP Values
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

#	SAP Code	No Pkg Flag	SAP Description
1	S	☑	SUSPENSION
2		☐	

*To save the record click **OK***

A Record Updates Pending, Save Changes dialog box displays

*Click **Yes***


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
SAP Value

2000 - 2001 EDExpress for Windows

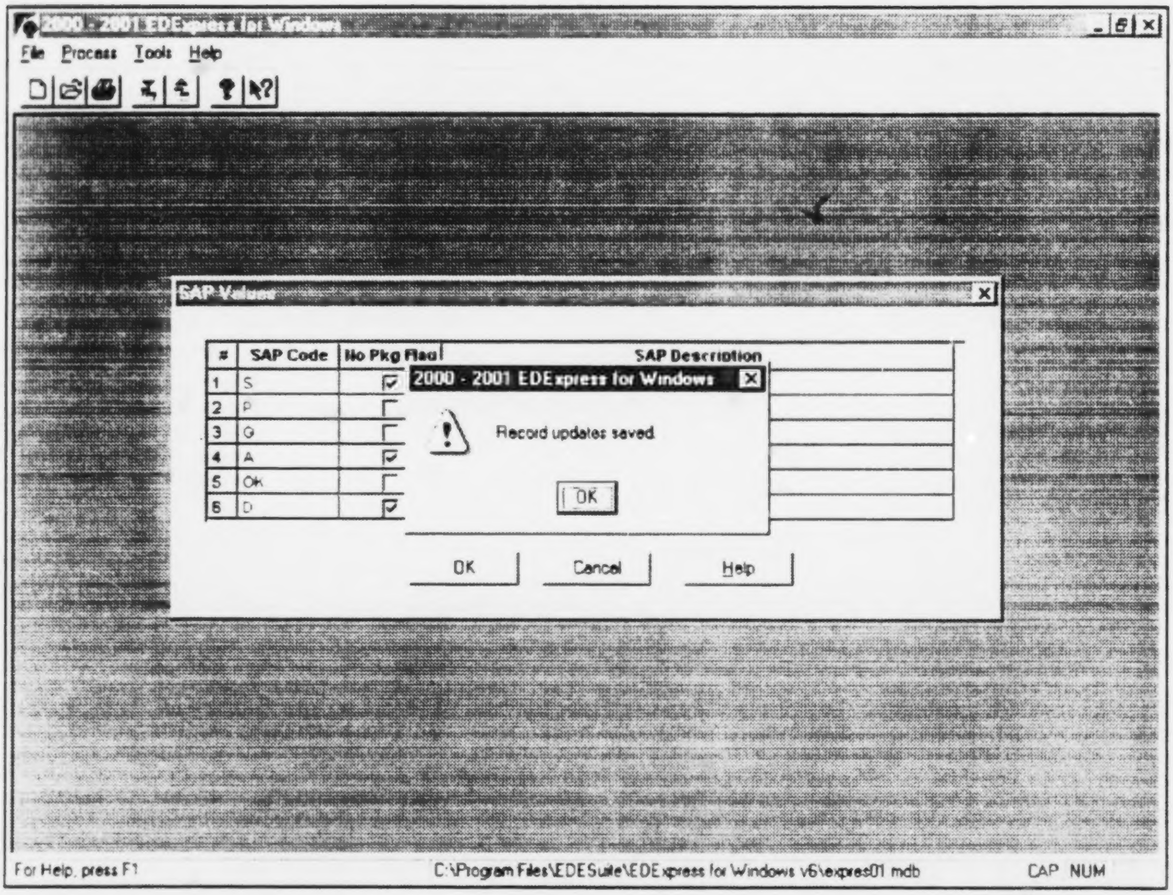
Record updates pending, save changes?

Yes
No
Cancel

#	SAP C		
1	S		
2	P		
3	G		
4	A	☑	SUSPENSION - APPEAL PENDING
5	OK	☐	SUSPENSION - APPEAL APPROVED
6	D	☑	SUSPENSION- APPEAL DENIED

OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

*Click **OK** to exit*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
SAP Values
OK
Cancel
Help
OK

2000 - 2001 EDExpress for Windows

Record updates saved.

#	SAP Code	No Pkg Flag	SAP Description
1	S	☑	
2	P	☐	
3	G	☐	
4	A	☑	
5	OK	☐	
6	D	☑	

For Help, press F1 C:\Program Files\EDESuite\EDExpress for Windows v6\expres01.mdb CAP NUM

User-Defined Formulas

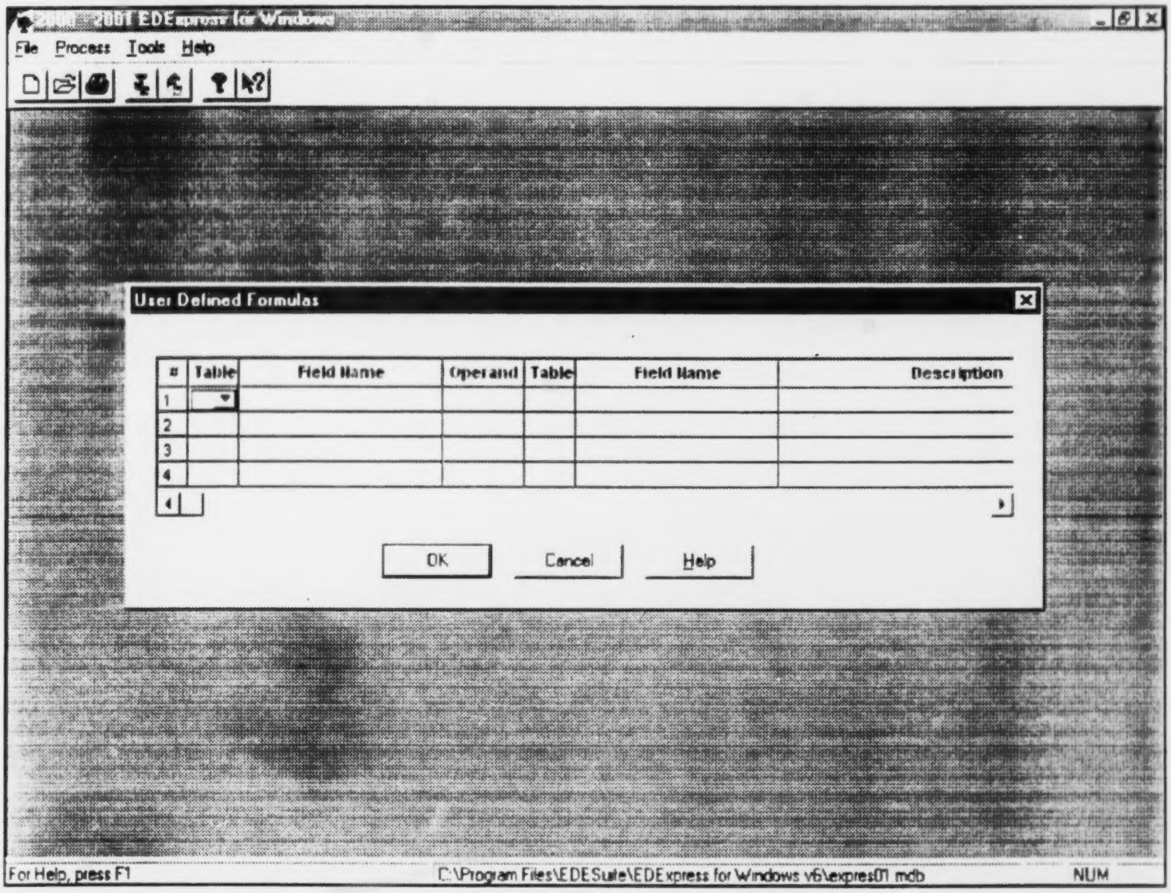
[Slide 2-40]

User-defined Formulas allow you to perform simple calculations by adding, subtracting, multiplying, or dividing data stored in two existing fields within certain EDExpress databases (the Student Packaging database, the Fund database, or the User-Defined database) The result of the calculation is stored in the Student Packaging database and is displayed on the Awards tab EDExpress allows you to create up to four User-defined Formulas which can be used in queries

Once you create and save a User-defined Formula, you cannot modify the formula To make changes, you must delete the formula and start over However, when you delete a previously existing formula, you also delete all the data that was previously calculated and stored

Examples of how you might use this feature include

- Access the Fund database to get the total of Subsidized and Unsubsidized Stafford loans awarded to each student for the academic year
- Access the Student Packaging database to calculate the amount of each student's need that was met by subtracting remaining need from unmet need
- Access the Student Packaging database to calculate the amount of the student's contribution to the EFC
- Create a query based on a formula and tie that query to an award methodology



#	Table	Field Name	Operand	Table	Field Name	Description
1						
2						
3						
4						

For Help, press F1 C:\Program Files\EDESuite\EDExpress for Windows v6\expres01.mdb NUM

Each User-defined Formula includes six components

- Database Table 1
- Field Name 1
- Operand
- Database Table 2
- Field Name 2
- Description

Database Table 1

This table determines where the value you use in Field 1 resides The options are

S = Packaging student database

F = Fund database

U = User-defined database (will only display if a numeric user-defined data field already exists in this database)

Field Name 1

Here you select the appropriate field name from the list of all fields that are available from the table chosen in the Database Table 1 field

NEW!

The Parent Contribution field is available for use in creating user-defined formulas

[Slide 2-41]

Operand

The operand defines what computation is performed

+ = Addition

- = Subtraction

* = Multiplication

/ = Division

Database Table 2

This second table determines where the value you use in Field 2 resides. The options are:

S	Packaging student database
F	Fund database
U	User-defined database (will only display if a numeric user-defined data field already exists in this database)

Field Name 2

Here you select the appropriate field name from the list of all fields that are available from the table chosen in the Database Table 2 field.

Description

The description is the user-defined name associated with this formula. You create the description using any combination of 24 characters (A-Z, 0-9).

[Slide 2-42]

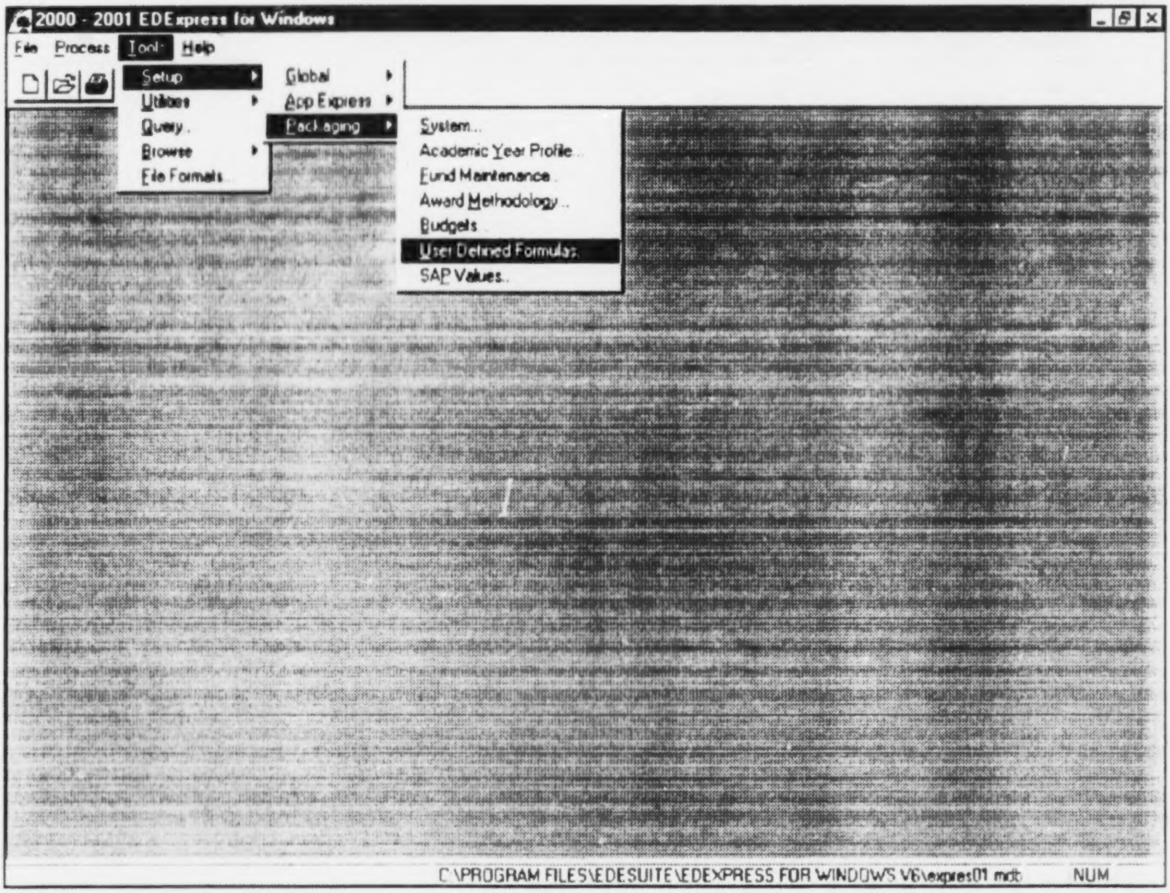
Creating User-defined Formulas

The following example demonstrates how to create a User-defined Formula that calculates the amount of original unmet need that is satisfied by the student's financial aid package To do this, we subtract remaining need from unmet need

To create a new User-defined Formula

Select ***Tools/Setup/ Packaging/User-Defined Formulas*** *from the menu*

Remember: *This setup is optional*

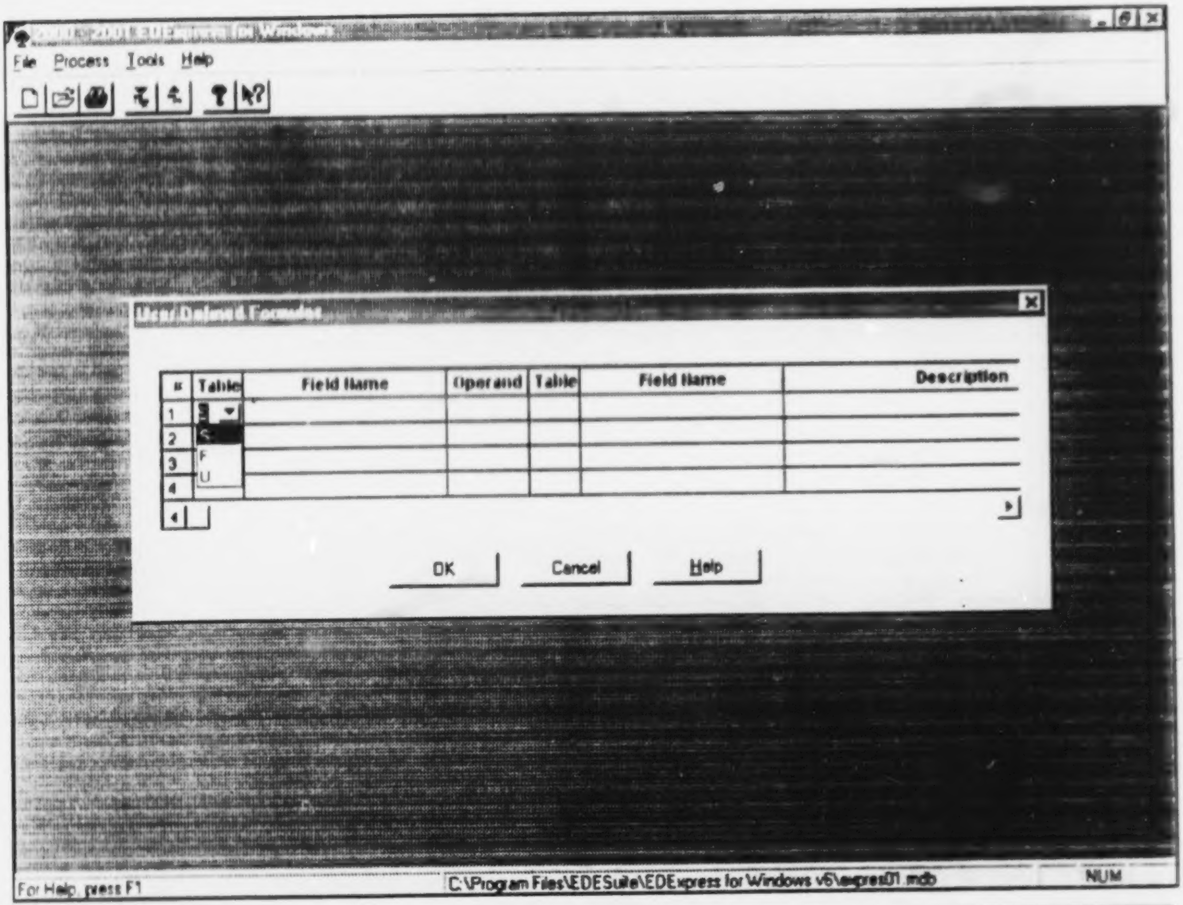

2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Setup
Utilities
Query...
Browse
File Formats...
Global
App Express
Packaging
System...
Academic Year Profile...
Fund Maintenance...
Award Methodology...
Budgets...
User Defined Formulas
SAP Values...
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

The User-Defined Formulas dialog box displays

Click the **Table** down arrow to view the available database options

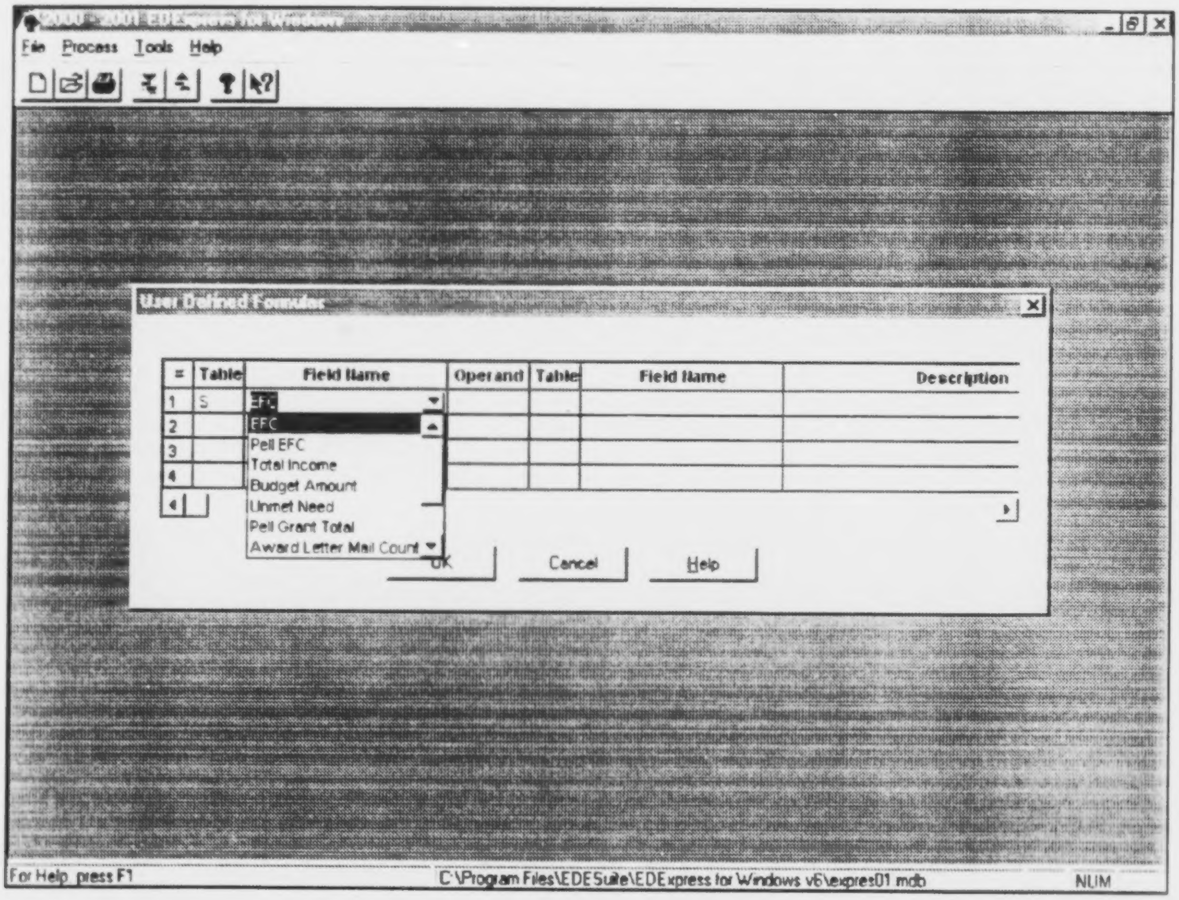
The data field we need is stored in the Student Packaging database so select **S**

Tip: The User Database (U) is available to User-Defined Formulas only when a numeric user-defined field exists in the User Database


File
Process
Tools
Help
User Defined Formulas
#
Table
Field Name
Operand
Table
Field Name
Description
1
2
3
4
S
S
F
U
OK
Cancel
Help
For Help, press F1
C:\Program Files\EDESuite\EDExpress for Windows v6\expres01.mdb
NUM

*Click the **Field Name** down arrow to display available fields in the Packaging database*

Select Unmet Need, the field name of the data used in the first part of the calculation

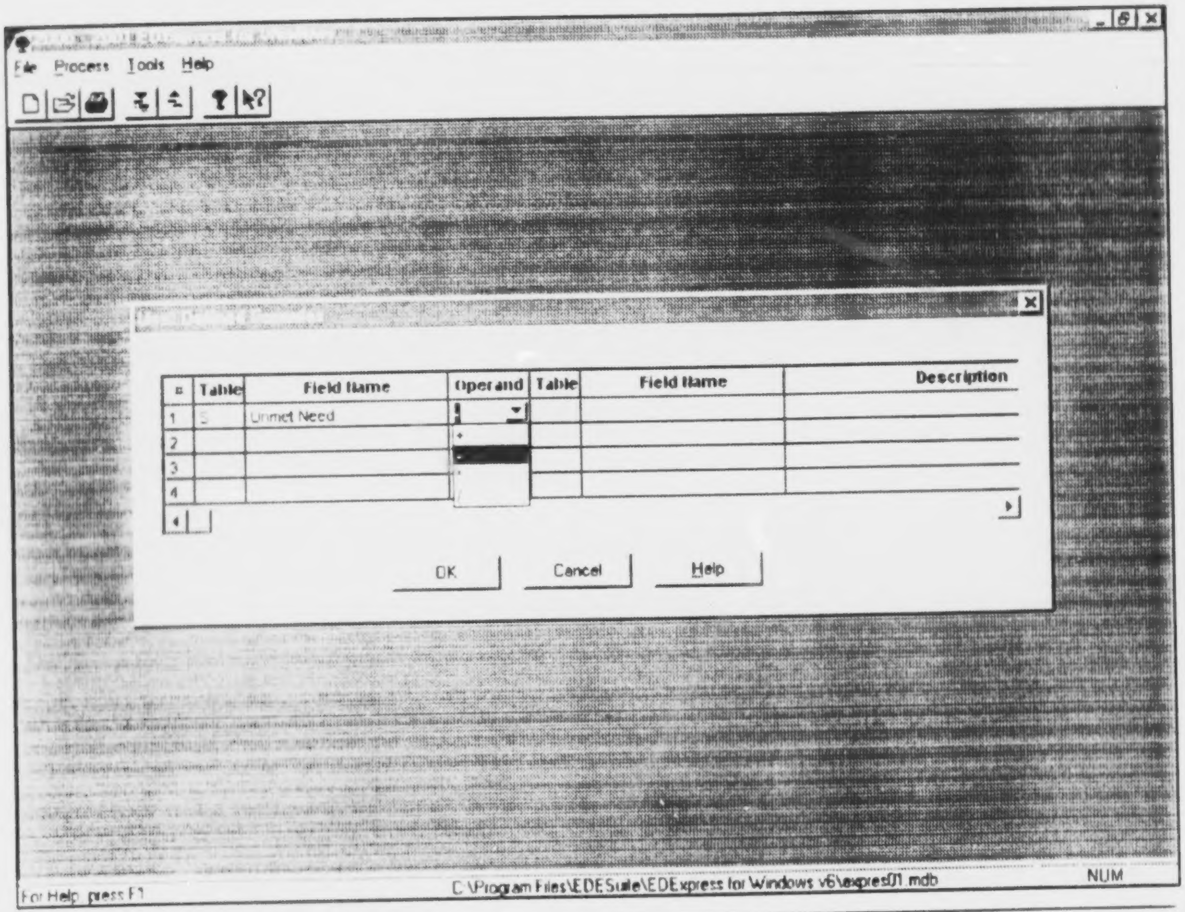

2000 - 2001 EDExpress for Windows
File Process Tools Help
User Defined Formulas
EFC
Pell EFC
Total Income
Budget Amount
Unmet Need
Pell Grant Total
Award Letter Mail Count
OK
Cancel
Help
For Help, press F1
NUM

#	Table	Field Name	Operand	Table	Field Name	Description
1	S	EFC				
2						
3						
4						

C:\Program Files\EDESuite\EDExpress for Windows v6\expres01.mdb

*Click the **Operand** down arrow to display the four available types of calculations that can be performed.*

Select the minus sign (-) to have the calculation subtract.

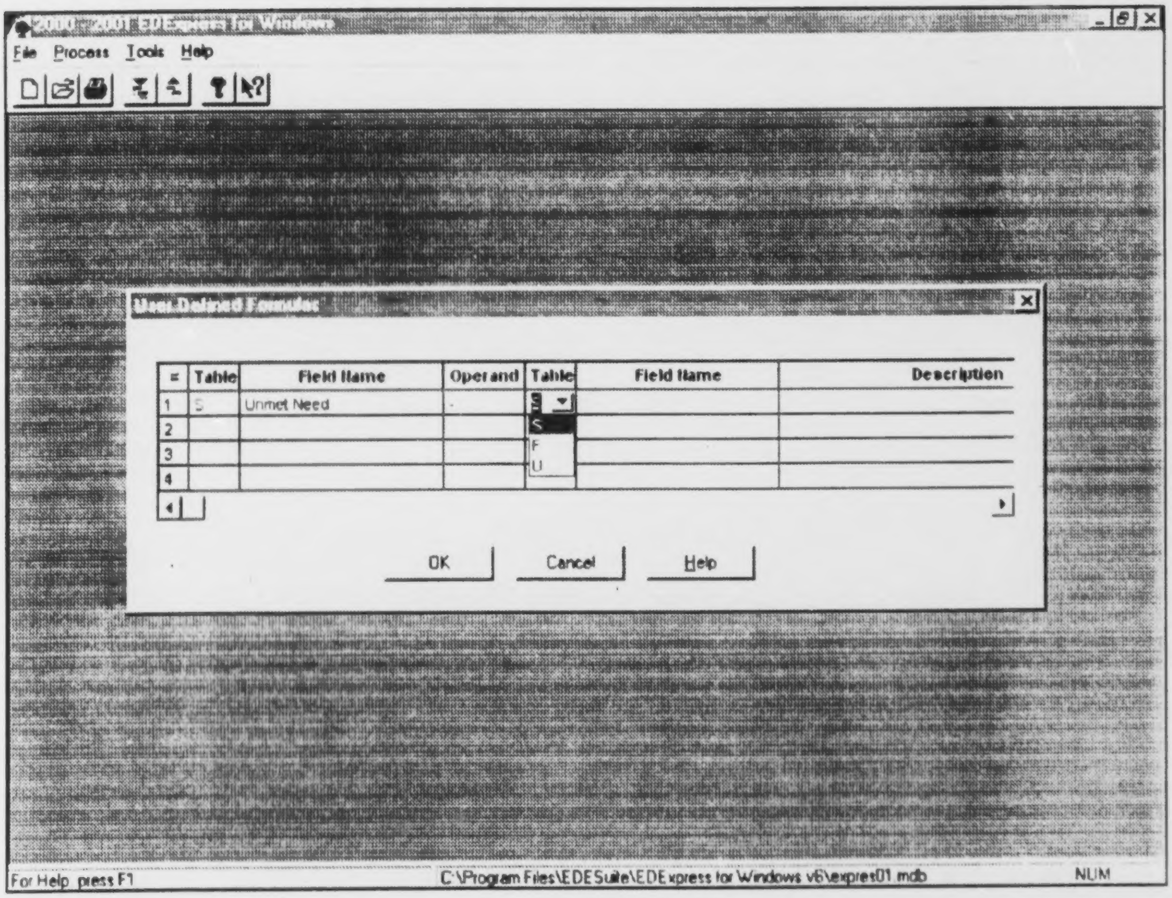


#	Table	Field Name	Operand	Table	Field Name	Description
1	5	Unmet Need				
2						
3						
4						

For Help, press F1
C:\Program Files\EDESuite\EDExpress for Windows v6\expres01.mdb
NUM

Next, click the second ***Table*** *down arrow*

Select S, since the data field for the second part of the calculation also is stored in the Packaging database

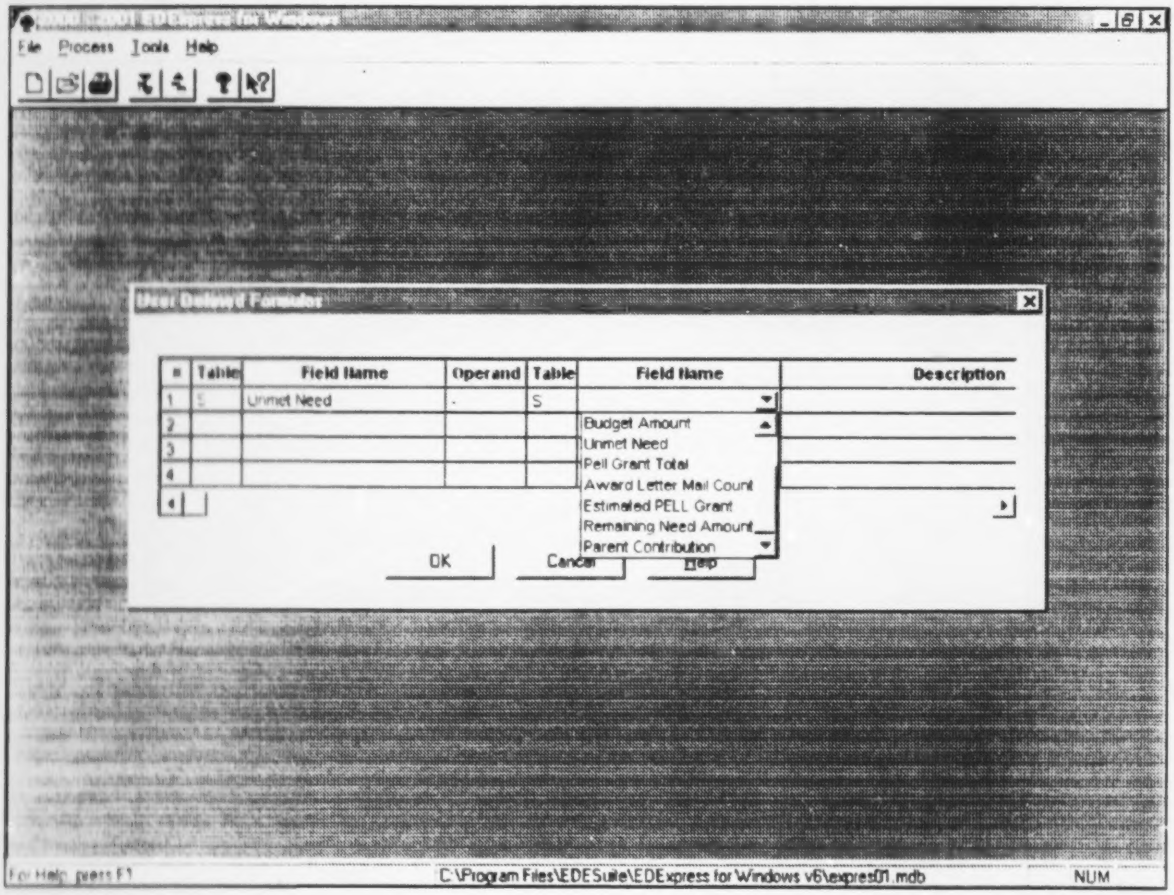

2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
User Defined Formulas
S
F
U
OK
Cancel
Help
For Help, press F1
NUM

#	Table	Field Name	Operand	Table	Field Name	Description
1	S	Unmet Need	-	S		
2						
3						
4						

C:\Program Files\EDESuite\EDExpress for Windows v6\expres01.mdb

Click the **Field Name** down arrow

Scroll down and select Remaining Need Amount, the field name of the data used in the second part of the calculation

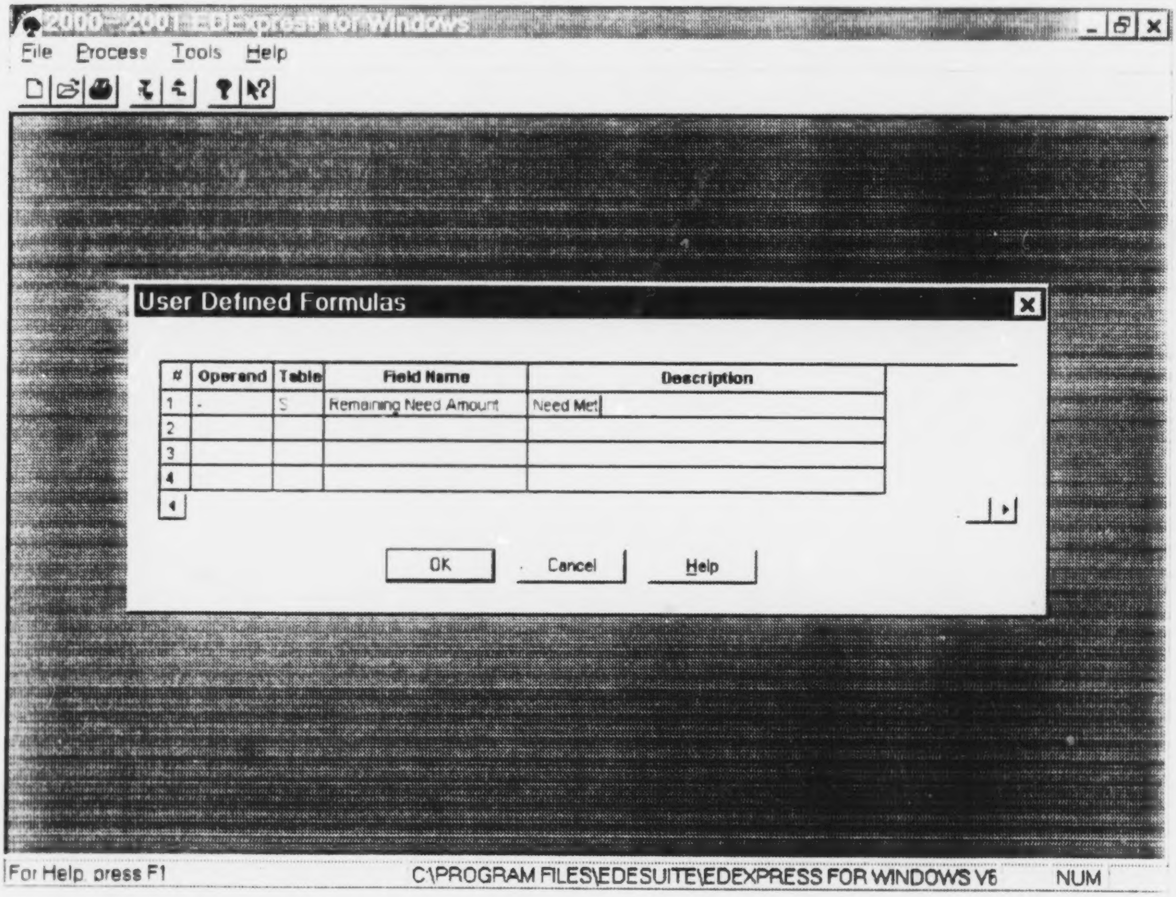


2000-2001 EDExpress for Windows
File Process Tools Help
User Defined Formulas
Budget Amount
Unmet Need
Pell Grant Total
Award Letter Mail Count
Estimated PELL Grant
Remaining Need Amount
Parent Contribution
OK
Cancel
Help
For Help, press F1
NUM

#	Table	Field Name	Operand	Table	Field Name	Description
1	S	Unmet Need	-	S		
2						
3						
4						

C:\Program Files\EDESuite\EDExpress for Windows v6\expres01.mdb

Finally, scroll over to **Description** and enter a descriptive name of up to 24 alphanumeric characters that readily identifies the User-defined formula


2000–2001 EDExpress for Windows
File Process Tools Help
User Defined Formulas
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

#	Operand	Table	Field Name	Description
1	-	S	Remaining Need Amount	Need Met
2				
3				
4				

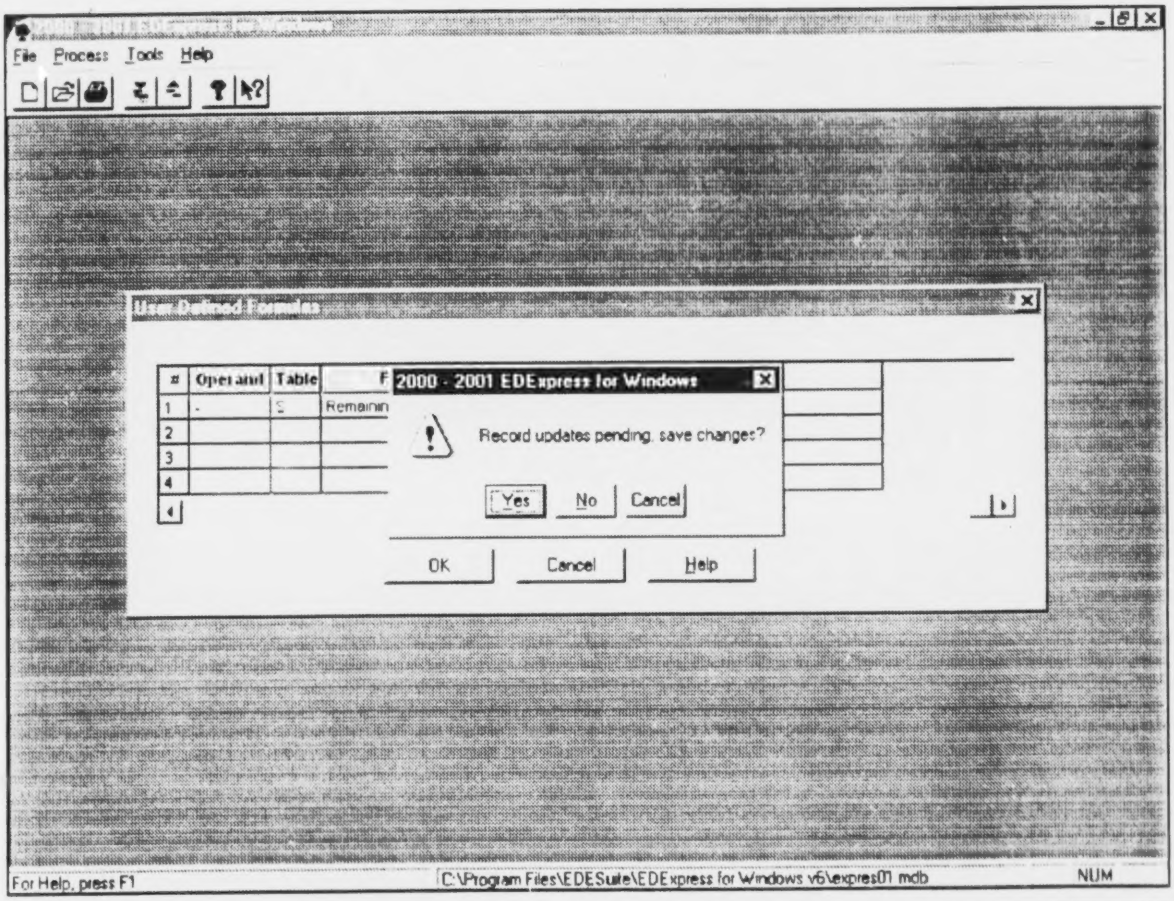
To save your changes, click ***OK***

A Record Updates Pending, Save Changes dialog box displays

Click ***Yes***

A Record Updates Saved dialog box displays

Click ***OK***


File
Process
Tools
Help
User Defined Formulas
2000 - 2001 EDExpress for Windows
Yes
No
Cancel
OK
Cancel
Help
For Help, press F1
NUM

#	Operand	Table	F
1	-	S	Remainin
2			
3			
4			

Record updates pending, save changes?

C:\Program Files\EDESuite\EDExpress for Windows v6\expres01.mdb

If student packaging records existed in the Packaging database prior to your creating a User-defined Formula, you must have EDExpress perform the formula's calculation to update those records

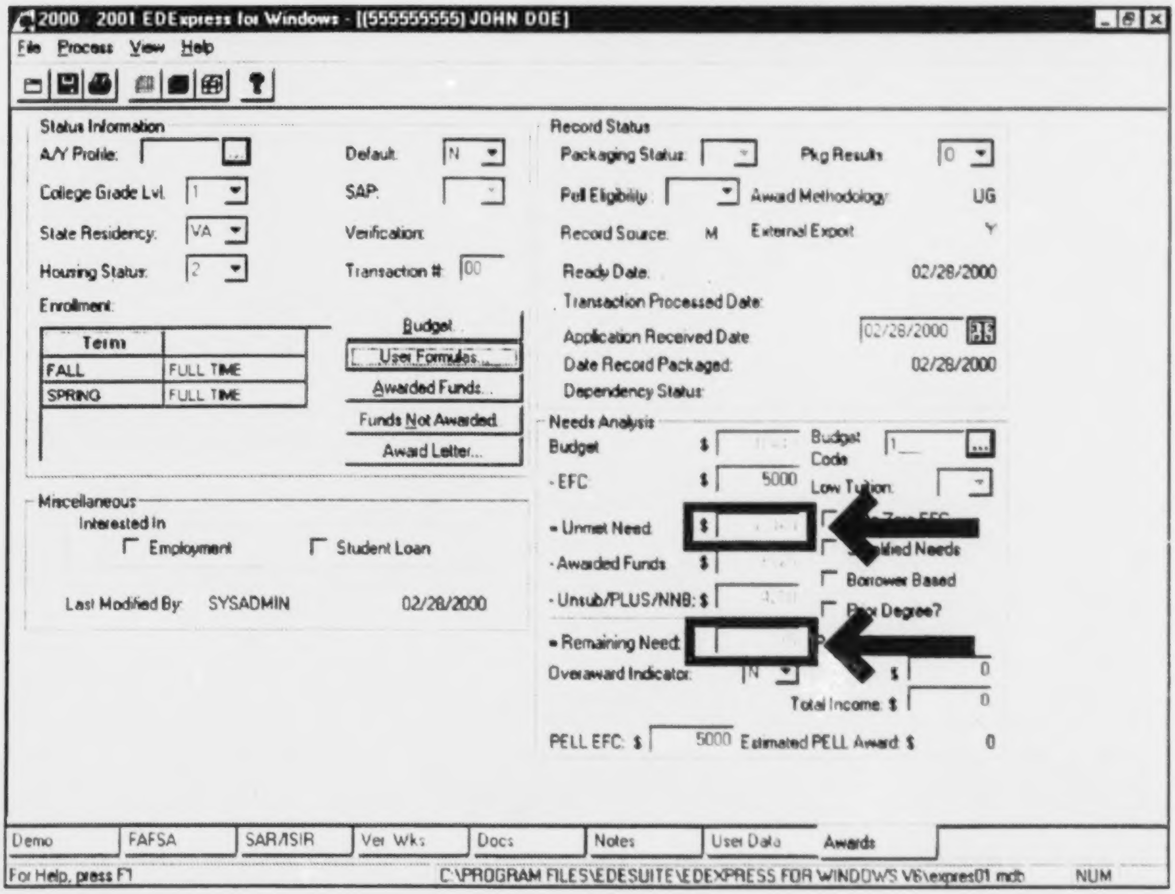
NEW!

The Packaging System allows you to batch calculate User-Defined Formulas

Below is an example of a student's Packaging record We see that this student had original Unmet Need of $11,440 After being packaged, the Remaining Need is $815

This User-defined Formula calculates

Unmet Need @ $11,440 – Remaining Need @ $815 = Need Met


File
Process
View
Help
Budget...
User Formulas...
Awarded Funds...
Funds Not Awarded
Award Letter...
Demo
FAFSA
SAR/ISIR
Ver Wks
Docs
Notes
User Data
Awards
For Help, press F1
NUM

2000 - 2001 EDExpress for Windows - [(555555555) JOHN DOE]

Status Information
A/Y Profile:
College Grade Lvl: 1
State Residency: VA
Housing Status: 2
Default: N
SAP:
Verification:
Transaction #: 00

Enrollment:

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous
Interested In
☐ Employment ☐ Student Loan
Last Modified By: SYSADMIN 02/28/2000

Record Status
Packaging Status:
Pkg Results: 0
Pell Eligibility:
Award Methodology: UG
Record Source: M
External Export: Y
Ready Date: 02/28/2000
Transaction Processed Date:
Application Received Date: 02/28/2000
Date Record Packaged: 02/28/2000
Dependency Status:

Needs Analysis
Budget $
Budget Code: 1
- EFC $ 5000
Low Tuition:
= Unmet Need $
- Awarded Funds $
- Unsub/PLUS/NNB: $
= Remaining Need
☐ Borrower Based
Overaward Indicator: N
$ 0
Total Income: $ 0
PELL EFC: $ 5000
Estimated PELL Award: $ 0

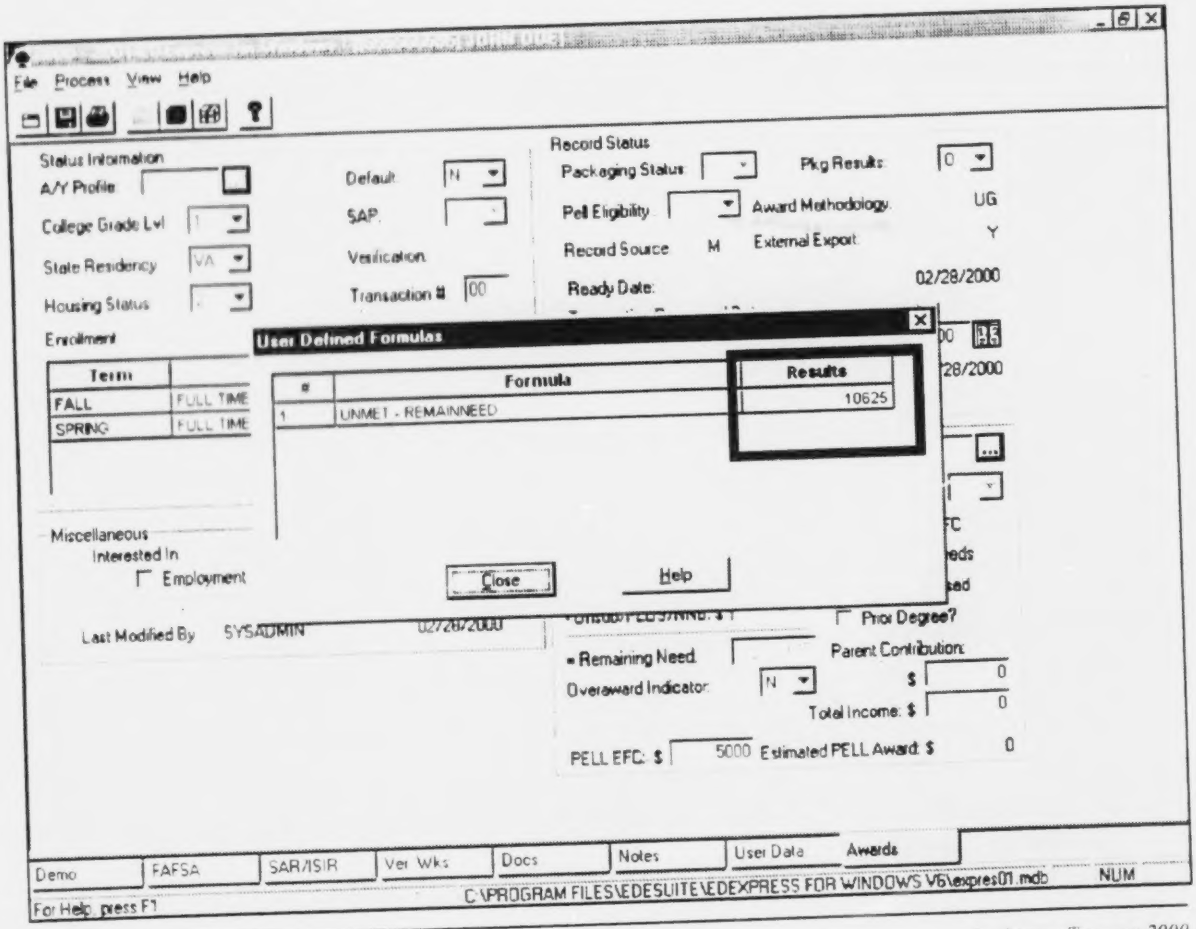
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

BEST COPY AVAILABLE

*Now click the **User Formulas** button to view the results of the formula*

Unmet Need – Remaining Need = Need Met @ $10,625

Note: Formula results are calculated in whole numbers


File
Process
View
Help
Close
Help
Demo
FAFSA
SAR/ISIR
Ver Wks
Docs
Notes
User Data
Awards
NUM
For Help, press F1

User Defined Formulas

#	Formula	Results
1	UNMET - REMAINNEED	10625

Status Information
A/Y Profile:
College Grade Lvl: 1
State Residency: VA
Housing Status:
Default: N
SAP:
Verification:
Transaction #: 00

Enrollment

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous
Interested In
☐ Employment

Last Modified By SYSADMIN 02/28/2000

Record Status
Packaging Status:
Pkg Results: 0
Pell Eligibility:
Award Methodology: UG
Record Source: M
External Export: Y
Ready Date: 02/28/2000

☐ Prior Degree?
= Remaining Need:
Parent Contribution: $ 0
Overaward Indicator: N
Total Income: $ 0
PELL EFC: $ 5000
Estimated PELL Award: $ 0

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

Apply What You Learned

The following exercise reviews some concepts introduced Select the best answer for each of the following questions

1 __________ of the setups for the Packaging process are done within the Packaging module

(a) All

(b) None

(c) Most

2 Queries can be used with EDExpress functions wherever you see____________

(a) Dialog box

(b) Selection criteria button

(c) Ellipsis button

(d) Query dialog box

3 A new feature in EDExpress allows you to __________ to create new queries

(a) Search a web site

(b) Write statements in Structured Query Language (SQL)

(c) Modify an existing query

(d) Phone a friend

4 Document tracking allows you to ____________

(a) Monitor the request and receipt of documents

(b) Update records

(c) Delay packaging or disbursement for a group of students

(d) All of the above

5 With the Packaging module you can import data from or export data to ____________

(a) An external database

(b) Other modules of EDExpress

(c) All of the above

(d) None of the above

6 User Data, Document Tracking, and Global System setups are located in the ________ module of EDExpress

(a) Global

(b) Apps

(c) Packaging

(d) Direct Loan

7 For help with Packaging in EDExpress you can ____________

(a) Search by topic

(b) Press the Help button

(c) Browse the Help index

(d) All of the above

8 Satisfactory Academic Progress (SAP) profiles allow you to ____________

(a) Prevent students not meeting user-defined criteria from being packaged

(b) Receive notification when a student drops a course

(c) Chat on line with students' academic advisors

(d) All of the above

9 Within the Packaging module you can create user defined formulas using ____________

(a) Any numeric field in the Applications or Packaging Database

(b) Any field within EDExpress

(c) Queries

(d) Both a and c

10 The Fund Maintenance feature of the Packaging module allows you to create ___________ funds

(a) Federal

(b) State

(c) Institutional and external

(d) All of the above

11 Within the Packaging module you can create Budgets for ___________

(a) All your student populations

(b) Undergraduate students only

(c) Full time students only

(d) Only students living on campus

12 A new feature of EDExpress allows you to modify text in___________

(a) Award letters

(b) Document tracking letters

(c) All of the above

(d) None of the above

13 The Academic Year Profile___________

(a) Is required when importing data to create packaging records

(b) Lists the terms for which student is awarded aid

(c) Distributes the percentage of each aid fund to award per term

(d) All of the above

14 An award methodology determines ___________

(a) Which funds and what amounts are awarded to a student

(b) Which type of award letter the student receives

(c) The student's SAP value

(d) All of the above

15 Options within the Packaging System setup include ___________

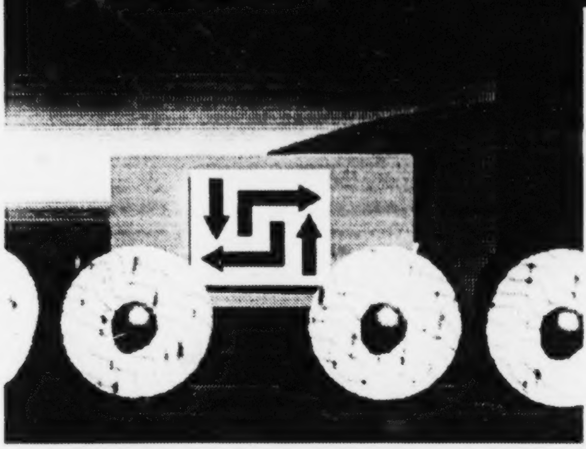
(a) Default housing status

(b) Number of award letters to print for each student

(c) Type of award letter to print for each student

(d) All of the above

Unit 3



Managing Data

Once all the Packaging and Global System Setups are in place, you are ready to create student packaging records and work with student data.

After student packaging records are created, you still have work to do with them, such as awarding, document tracking, updating user-defined data. EDExpress provides the Process function to allow you to work with multiple records at once, which can be a very efficient method of working with data.

There are three ways to create a packaging record:

- ISIR data import
- Manual entry
- External data import

An ISIR data import is the most efficient way to create packaging records. With this method, you simply move student data from the EDExpress Apps Module to the Packaging Module. However, those schools that do not require that all of their financial aid applicants file a FASFA need another method of creating packaging records. For those students who do not file a FASFA, you can create student packaging records by manual entry. Or you can create student packaging records by importing external data (e.g., such as the students' names, Social Security Numbers, addresses, etc.) from your school's database into the Packaging Module.

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Objectives

1. Be able to create new packaging records
2. Understand the concept of importing external data to add and update packaging records
3. Become familiar with the components of the Awards tab (where the student's packaging record displays in EDExpress)
    - Status Information
    - Miscellaneous
    - Record Status
    - Needs Analysis
4. Learn how to work with multiple student records at one time and how to clear data files from the EDExpress database

[Slide 3-2]

Importing ISIR Data

The ISIR Import function takes data from the existing EDExpress Apps database and uses it to create an associated record in the Packaging database. The student's record in the Packaging database is displayed on the Awards tab.

EDExpress imports data into the Packaging Module only for those ISIR records that have valid EFCs. Rejected and duplicate ISIR records are not imported. A duplicate ISIR record is one that has the same trankey (SSN, name identifier, and transaction number) as another record already in the database.

For students having multiple ISIR transactions/records, the transaction currently *active* is the record imported. Generally, the most recent transaction will be the active one. However, you can activate any non-rejected transaction you want to import. You also can import subsequent ISIR transactions to update a student's packaging record, but only as long as the student has not been packaged. [Slide 3-3]

Depending on the options you select when you import ISIR records and on the criteria the student records meet, the EDExpress Packaging Module calculates or updates certain fields for each packaging record created by an ISIR import.

- **A/Y Profile** (Academic Year Profile) is a required field when importing ISIR records and is based on the selection you make at import.
- **Enrollment Term(s)** is based on the Academic Year Profile that you assigned to the student's record at import.
- **College Grade Level** is updated according to the ISIR record.
- **State Residency** is updated according to the student's demographic record.
- **Housing Status** is updated according to the ISIR record or the default indicated in the Packaging System setup.
- **Budget Code** can be excluded when importing ISIR records into the Packaging database.
- **Need Analysis Budget** is calculated based on the Budget Code assigned to the student's record.
- **EFC** is calculated from the ISIR record based on the number of months indicated in the AYP setup.
- **Unmet Need** is calculated by subtracting the EFC from the Need Analysis Budget.
- **Remaining Need** is calculated by subtracting the total of awarded funds from Unmet Need. (Remember, funds won't be awarded until you run the Packaging process.)
- **Pell EFC** is the student's 9-month EFC from the ISIR record used to calculate Pell Grant eligibility.
- **Estimated Pell Award** is calculated based on the value of the Pell EFC.
- **Packaging Status** updates to R (ready to package) or N (not ready to package) based on whether the student has been assigned documents that are required for packaging and the status of those documents. The Packaging Status updates to R if no document required for packaging has been assigned or if the status of that document has been updated to Received or Waived. [Slide 3-4 and 3-5]

Importing ISIRs

To import ISIR data into the Packaging Module

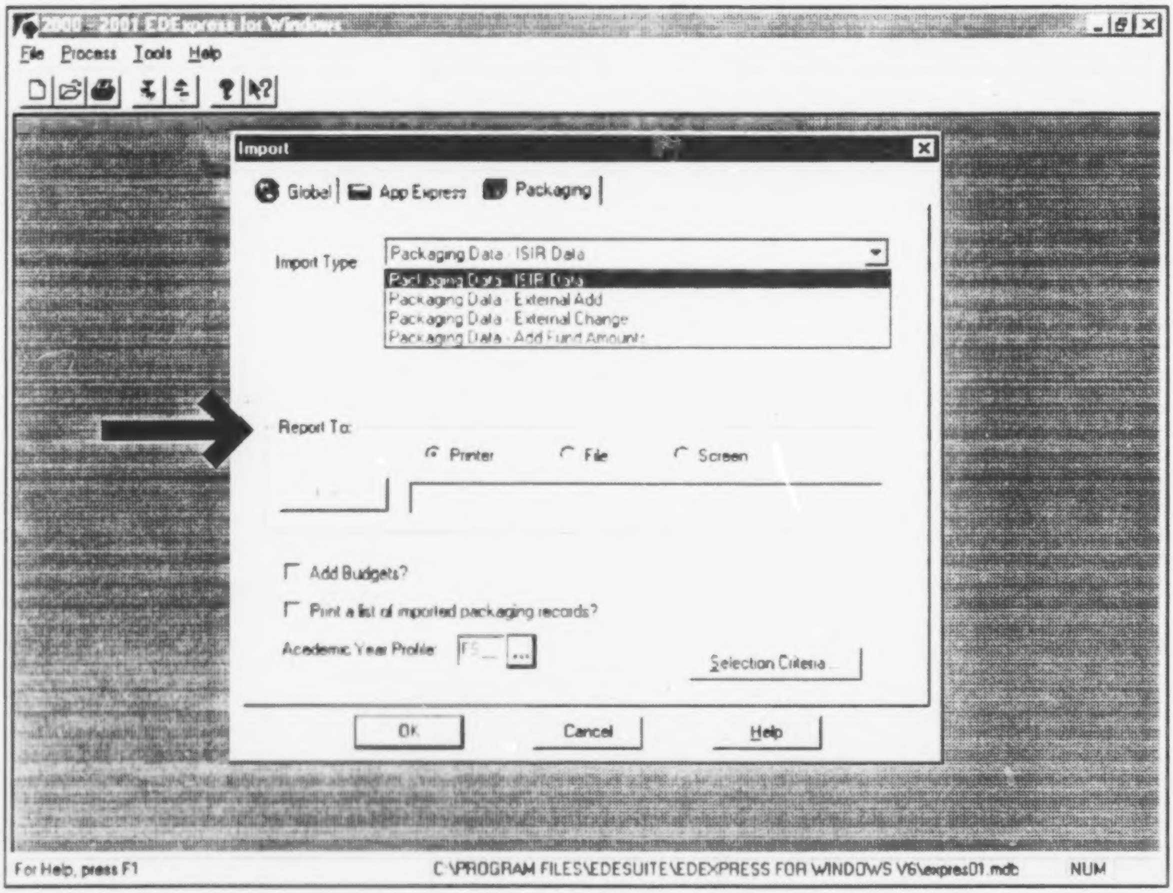
*Select **File/Import** on the menu bar*

*Click the **Packaging** tab, if you need to*

*Click the down arrow on the **Import Type** field to display a list of file types that can be imported*

Select Packaging Data - ISIR Data

This method of creating records in the Packaging database assumes that you already have imported processed ISIRs into the EDExpress Apps Module.


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Import
Global
App Express
Packaging
Packaging Data - ISIR Data
Packaging Data - External Add
Packaging Data - External Change
Packaging Data - Add Fund Amounts
Selection Criteria...
OK
Cancel
Help
For Help, press F1
NUM

Import Type: Packaging Data - ISIR Data

Report To: ● Printer ○ File ○ Screen

☐ Add Budgets?

☐ Print a list of imported packaging records?

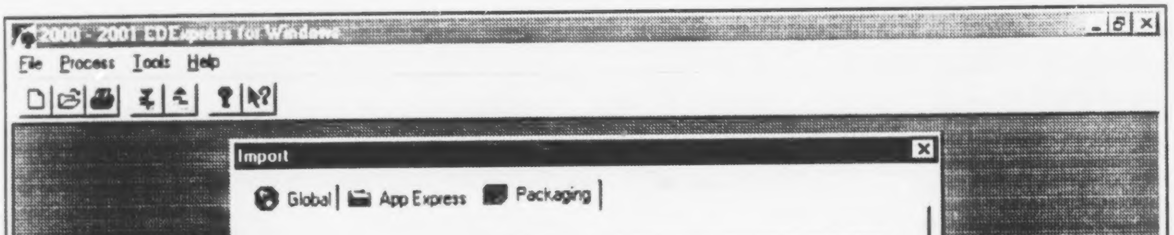
Academic Year Profile: FS__

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

Note: The Report To option generates a summary edit report that lists only rejected records

Click **Printer**, **File** or **Screen** as the output destination you want for the summary edit report that generates. If you select **File**, click the ellipsis (...) button and enter a file name.

Click **Print a list of imported packaging records?** to print a complete listing of all the records in the edit report.


2000 - 2001 EDExpress for Windows
File Process Tools Help
Import
Global
App Express
Packaging
Selection Criteria ...
OK
Cancel
Help
For Help, press F1
NUM

Import Type: Packaging Data ISIR Data

Report To: ○ Printer ○ File ● Screen

☐ Add Budgets?

☑ Print a list of imported packaging records?

Academic Year Profile: FS__

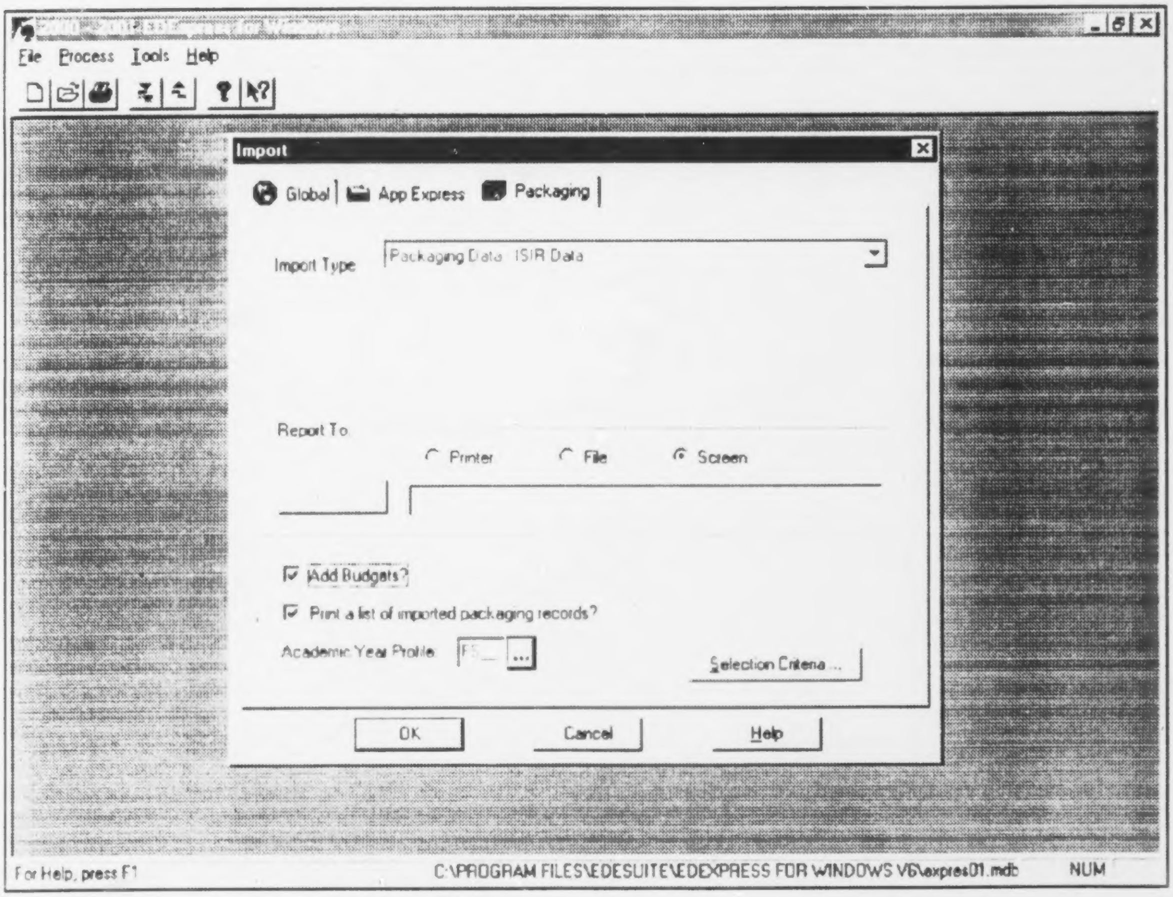
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

BEST COPY AVAILABLE

Click **Add Budgets?** if you want the system to automatically add budgets to student records added to the Packaging database by the ISIR Data import

You can exclude the Add Budgets? option when importing ISIR records into the Packaging database

Remember: *If you select the Add Budgets? option, budget codes are assigned automatically to student records according to the selection criteria (query) and the budget priority you indicated in the Budgets setup. If you want more control over this process, you can skip this option and use the batch Process Add Budgets instead*


2000-2001 EDExpress for Windows
File
Process
Tools
Help
Import
Global
App Express
Packaging
Selection Criteria ...
OK
Cancel
Help

Import Type: Packaging Data: ISIR Data

Report To: ○ Printer ○ File ● Screen

☑ Add Budgets?

☑ Print a list of imported packaging records?

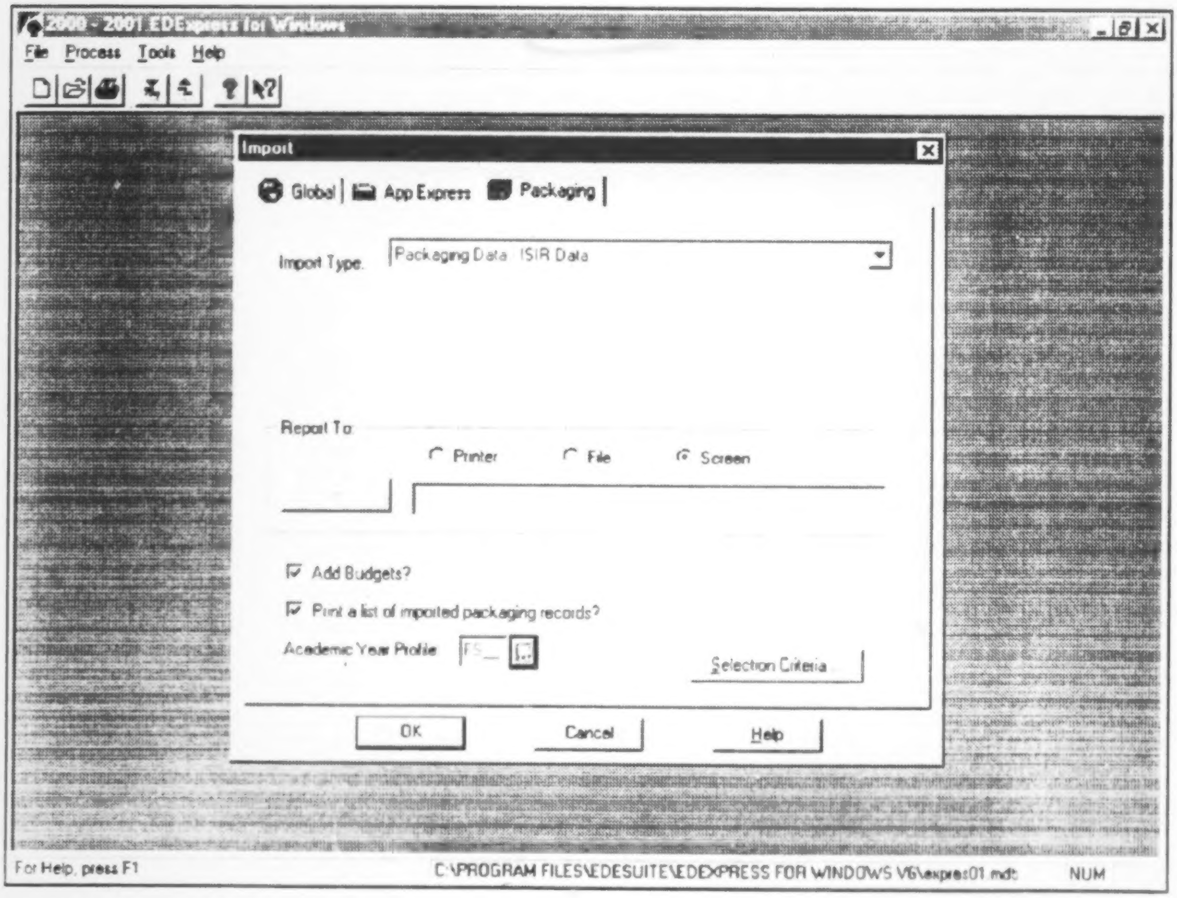
Academic Year Profile: FS

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb NUM

Tip When importing a large file of ISIR records, you might want to skip the Add Budgets? option, since this function sometime slows the ISIR import. Instead, use the Process Add Budgets or Process Multiple Entry functions after you import the ISIR records.

The Academic Year Profile (AYP) you indicated as the default in Packaging System Setup displays


2000 - 2001 EDExpress for Windows
File Process Tools Help
Import
Global
App Express
Packaging
Selection Criteria...
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

Import Type: Packaging Data - ISIR Data

Report To: ○ Printer ○ File ● Screen

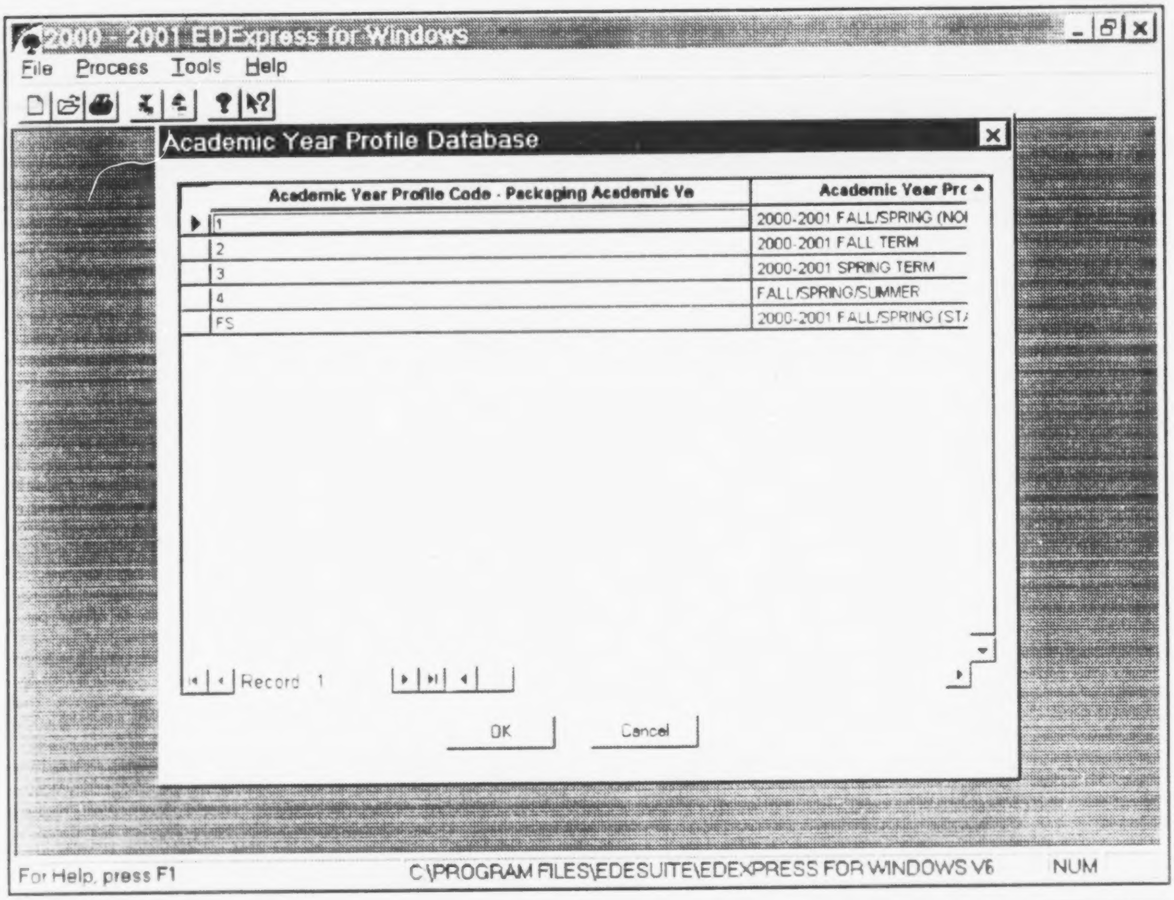
☑ Add Budgets?

☑ Print a list of imported packaging records?

Academic Year Profile: FS__

If you want to select a different AYP, click the ***ellipsis (...)*** *button to display a list of available AYP codes.*

Click the AYP you want, then click ***OK***

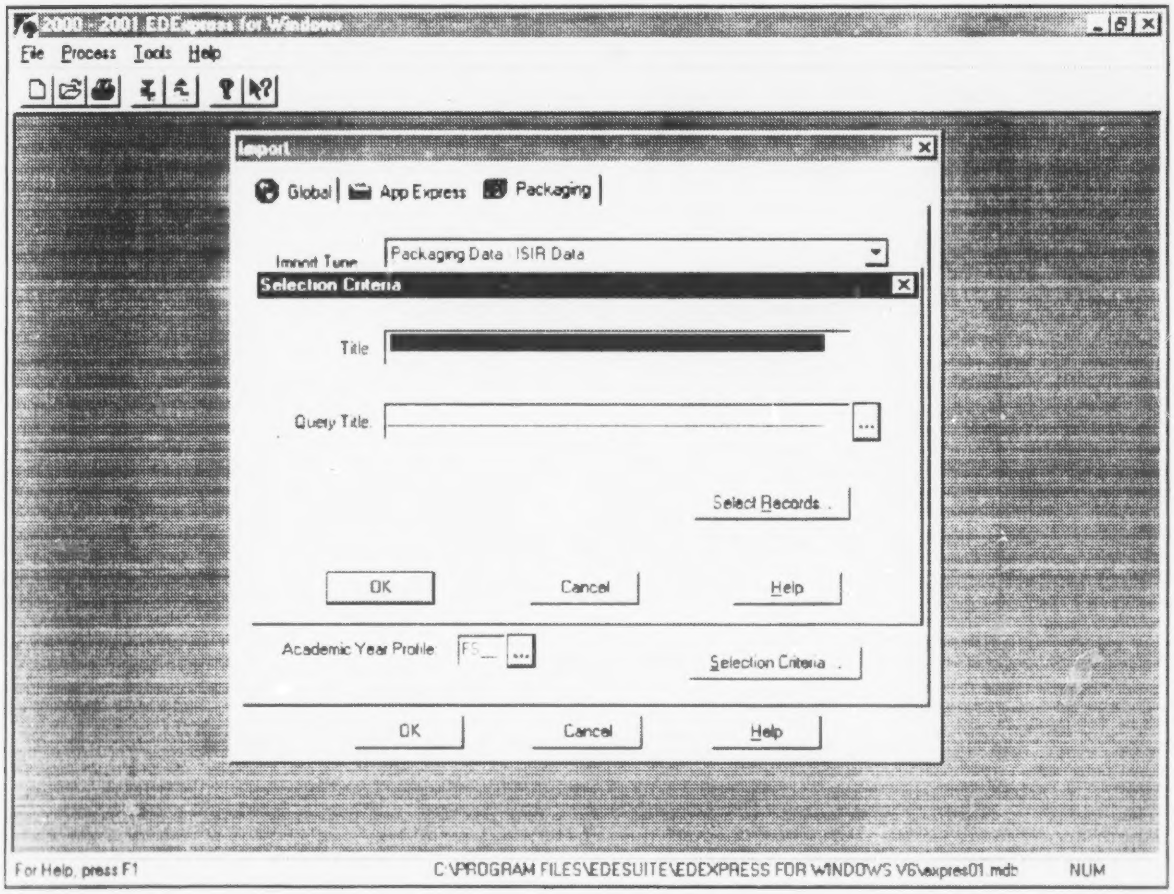

2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Academic Year Profile Database
Record 1
OK
Cancel

Academic Year Profile Code - Packaging Academic Ye	Academic Year Prc
1	2000-2001 FALL/SPRING (NO
2	2000-2001 FALL TERM
3	2000-2001 SPRING TERM
4	FALL/SPRING/SUMMER
FS	2000-2001 FALL/SPRING (ST

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6 NUM

*Click the **Selection Criteria** button if you want to specify a group of records to import*

*Click either the **Select Records** button to choose individual ISIR records from a list or the **Query Title** ellipsis button to display the list of queries created in the Apps Module*



2000 – 2001 EDExpress for Windows
File
Process
Tools
Help
Import
Global
App Express
Packaging
Selection Criteria
Select Records ...
OK
Cancel
Help
Selection Criteria ...
OK
Cancel
Help

Import Type: Packaging Data : ISIR Data

Title:

Query Title:

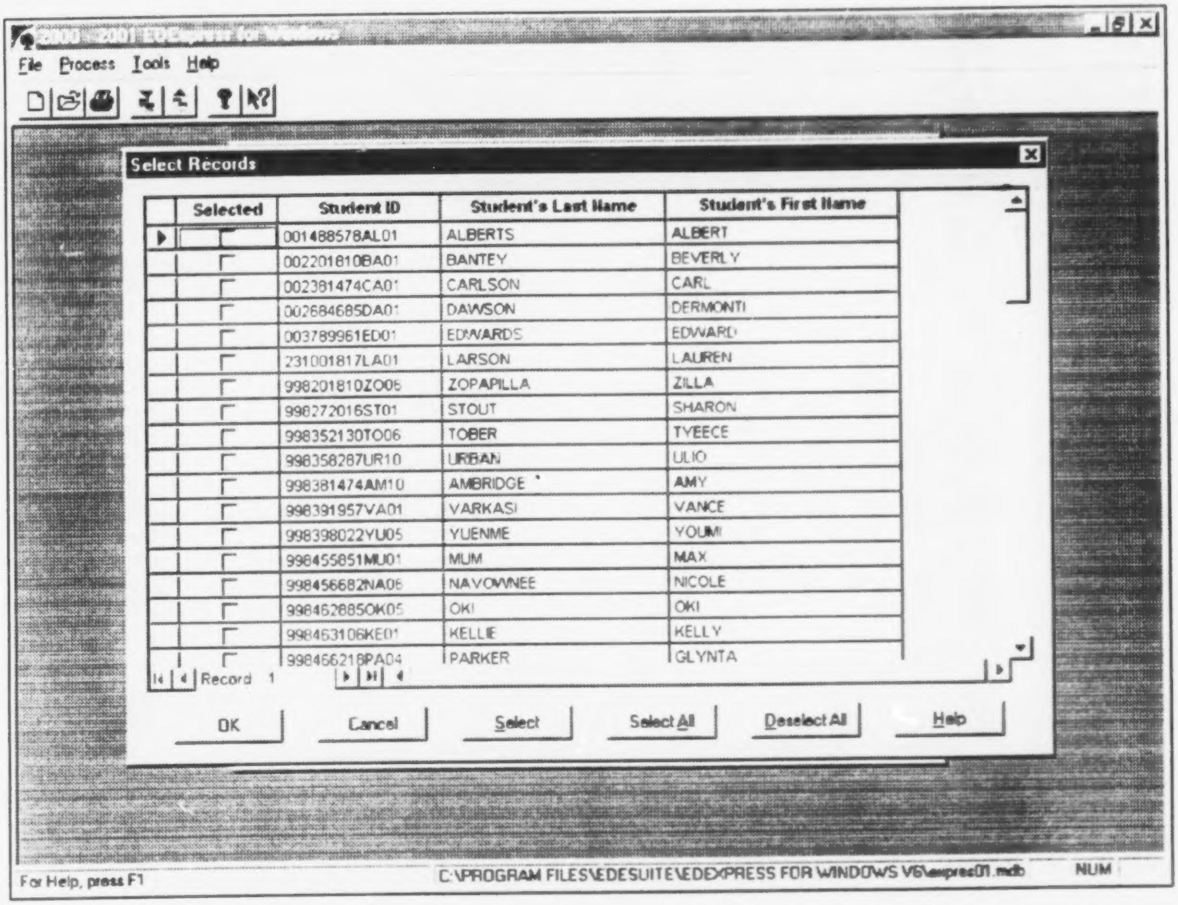
Academic Year Profile: FS__

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

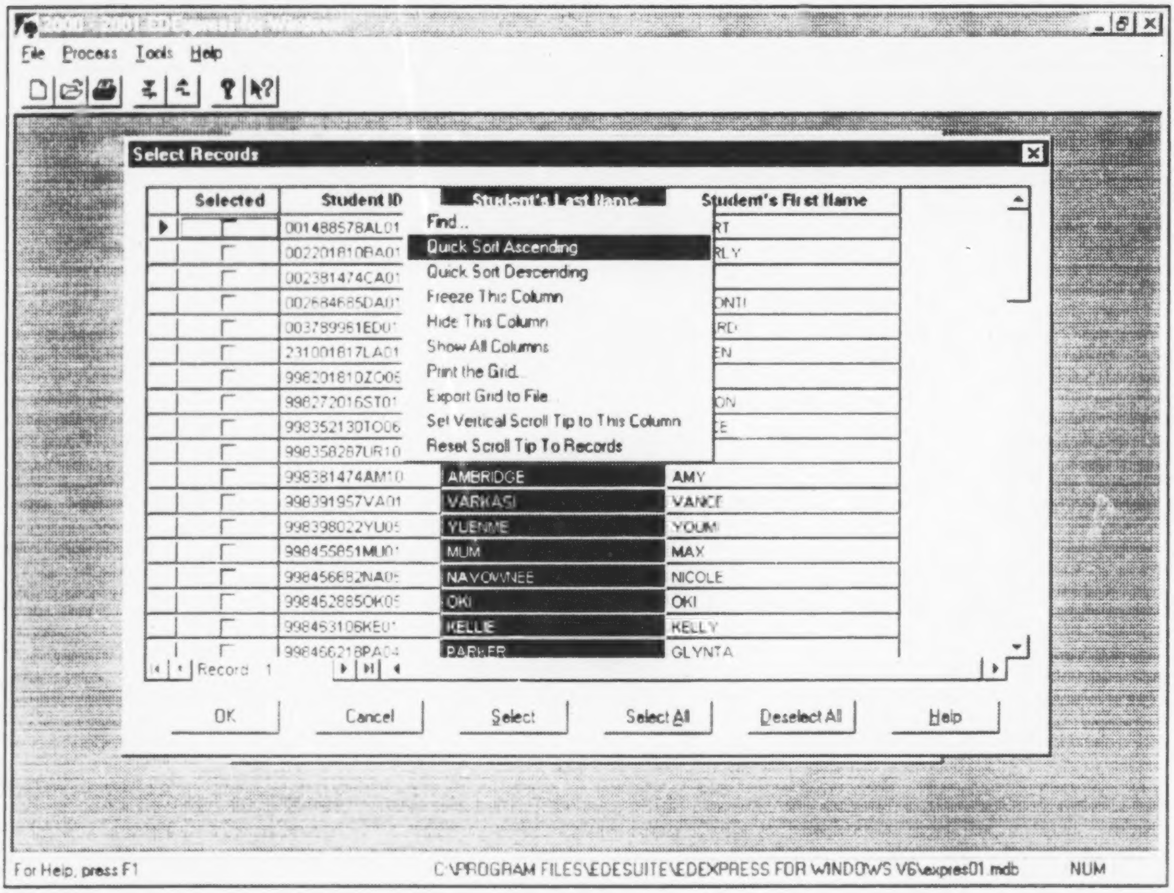
NUM

When you click the ***Select Records*** *button, ISIR records display in Social Security Number order*


2000 - 2001 EDExpress for Windows
File Process Tools Help
Select Records
Record 1
OK
Cancel
Select
Select All
Deselect All
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

	Selected	Student ID	Student's Last Name	Student's First Name
▶	☐	001488578AL01	ALBERTS	ALBERT
	☐	002201810BA01	BANTEY	BEVERLY
	☐	002381474CA01	CARLSON	CARL
	☐	002684685DA01	DAWSON	DERMONTI
	☐	003789961ED01	EDWARDS	EDWARD
	☐	231001817LA01	LARSON	LAUREN
	☐	998201810ZO06	ZOPAPILLA	ZILLA
	☐	998272016ST01	STOUT	SHARON
	☐	998352130TO06	TOBER	TYEECE
	☐	998358287UR10	URBAN	ULIO
	☐	998381474AM10	AMBRIDGE	AMY
	☐	998391957VA01	VARKASI	VANCE
	☐	998398022YU05	YUENME	YOUMI
	☐	998455851MU01	MUM	MAX
	☐	998456682NA06	NAVOWNEE	NICOLE
	☐	998462885OK05	OKI	OKI
	☐	998463106KE01	KELLIE	KELLY
	☐	998466218PA04	PARKER	GLYNTA

To sort the ISIR records in alphabetical order, click the ***Student's Last Name*** *column, right click, then click* ***Quick Sort Ascending***


File
Process
Tools
Help
Select Records
Find...
Quick Sort Ascending
Quick Sort Descending
Freeze This Column
Hide This Column
Show All Columns
Print the Grid...
Export Grid to File
Set Vertical Scroll Tip to This Column
Reset Scroll Tip To Records
Record 1
OK
Cancel
Select
Select All
Deselect All
Help

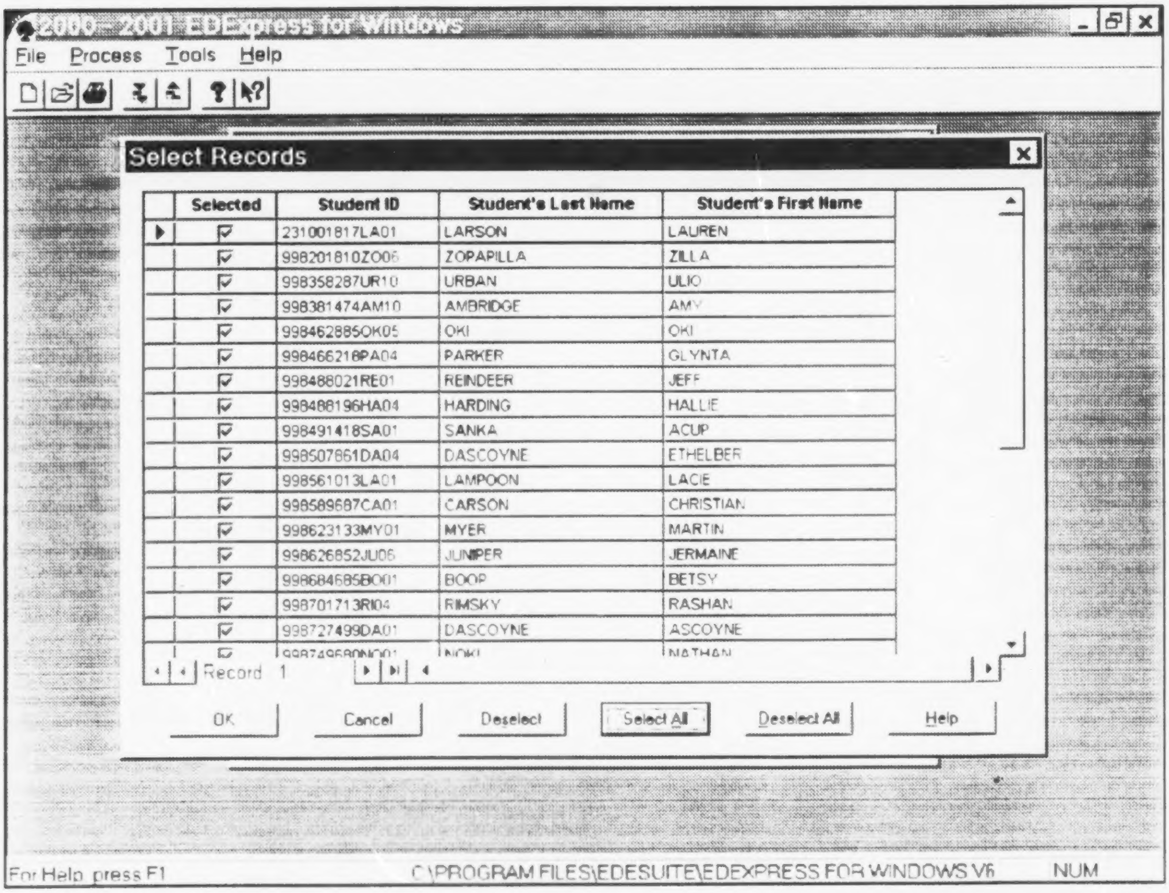
Selected	Student ID	Student's Last Name	Student's First Name
☐	001488578AL01		RT
☐	002201810BA01		RLY
☐	002381474CA01		
☐	002684685DA01		ONTI
☐	003789961ED01		RD
☐	231001817LA01		EN
☐	998201810ZO05		
☐	998272016ST01		ON
☐	998352130TO06		E
☐	998358287UR10		
☐	998381474AM10	AMBRIDGE	AMY
☐	998391957VA01	VARKASI	VANCE
☐	998398022YU05	YUENME	YOUMI
☐	998455851MU01	MUM	MAX
☐	998456682NA05	NAVOWNEE	NICOLE
☐	998452885OK05	OKI	OKI
☐	998453106KE01	KELLIE	KELLY
☐	998466218PA04	PARKER	GLYNTA

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb NUM

*To select individual ISIR records, click the **Selected** box of each record you want to import*

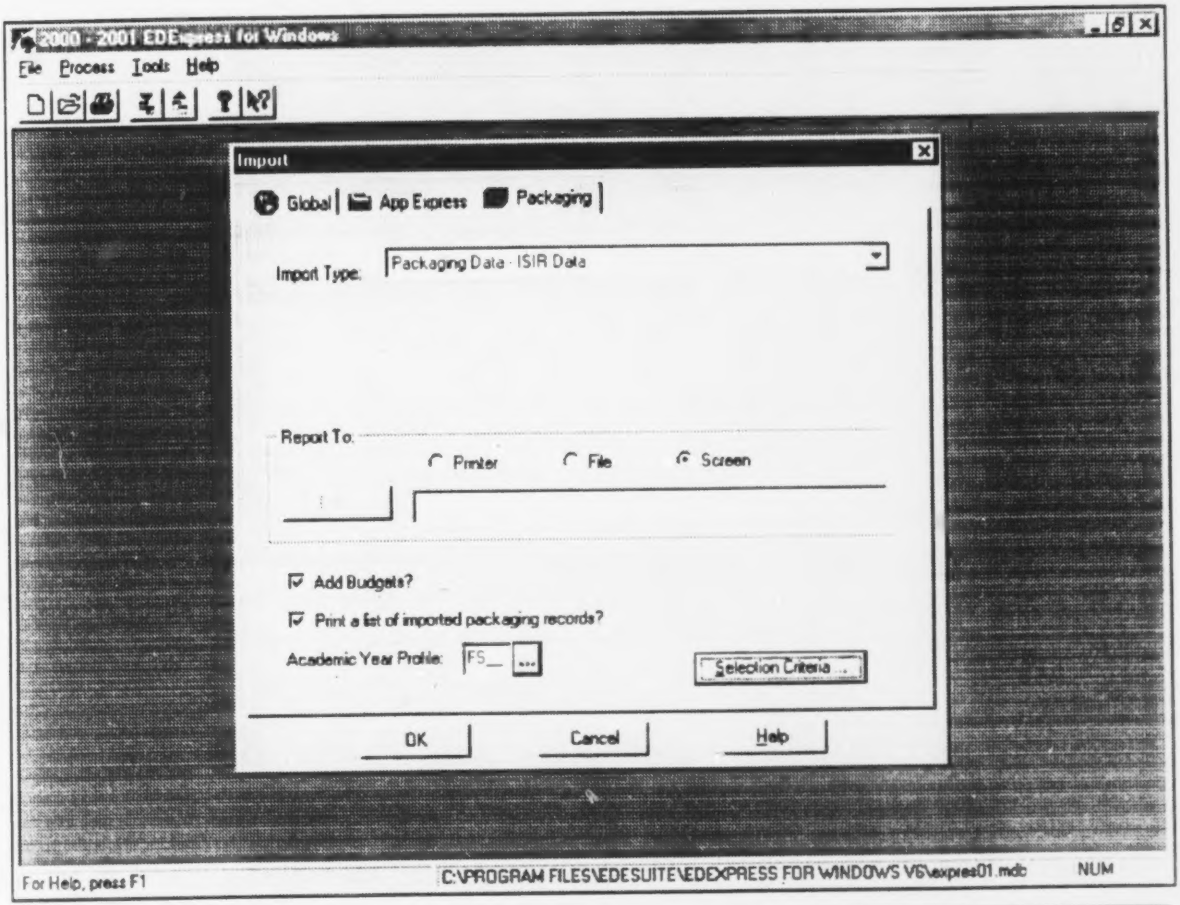
*Click **OK** when done*

To import all records into the ISIR file, choose Select All or skip the Selection Criteria option


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Select Records
Record 1
OK
Cancel
Deselect
Select All
Deselect All
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

	Selected	Student ID	Student's Last Name	Student's First Name
▶	☑	231001817LA01	LARSON	LAUREN
	☑	998201810ZO06	ZOPAPILLA	ZILLA
	☑	998358287UR10	URBAN	ULIO
	☑	998381474AM10	AMBRIDGE	AMY
	☑	998462885OK05	OKI	OKI
	☑	998466218PA04	PARKER	GLYNTA
	☑	998488021RE01	REINDEER	JEFF
	☑	998488196HA04	HARDING	HALLIE
	☑	998491418SA01	SANKA	ACUP
	☑	998507861DA04	DASCOYNE	ETHELBER
	☑	998561013LA01	LAMPOON	LACIE
	☑	998589687CA01	CARSON	CHRISTIAN
	☑	998623133MY01	MYER	MARTIN
	☑	998626852JU06	JUNIPER	JERMAINE
	☑	998684685BO01	BOOP	BETSY
	☑	998701713RI04	RIMSKY	RASHAN
	☑	998727499DA01	DASCOYNE	ASCOYNE
	☑	998749680NO01	NOKI	NATHAN

Click ***OK*** *again to begin the import process*


2000 - 2001 EDExpress for Windows
File Process Tools Help
Import
Global
App Express
Packaging
OK
Cancel
Help
Selection Criteria ...

Import Type: Packaging Data - ISIR Data

Report To: ○ Printer ○ File ● Screen

☑ Add Budgets?

☑ Print a list of imported packaging records?

Academic Year Profile: FS__

For Help, press F1 | C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb | NUM

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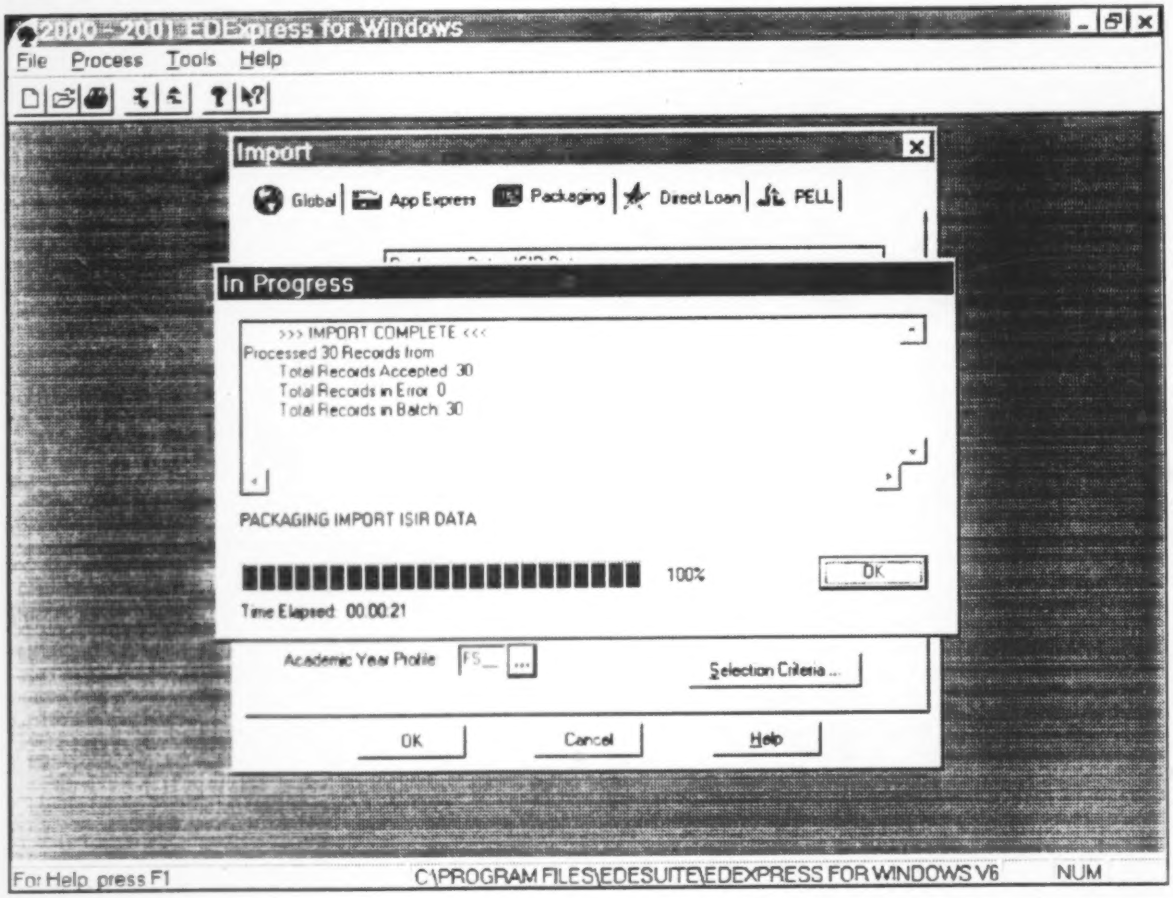
When the import is done, a Packaging Import ISIR Data dialog box displays

*Click **OK** to continue*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Import
Global
App Express
Packaging
Direct Loan
PELL
In Progress
OK
Academic Year Profile
FS__
Selection Criteria ...
OK
Cancel
Help
For Help press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

```
      >>> IMPORT COMPLETE <<<
Processed 30 Records from
      Total Records Accepted  30
      Total Records in Error  0
      Total Records in Batch  30
```

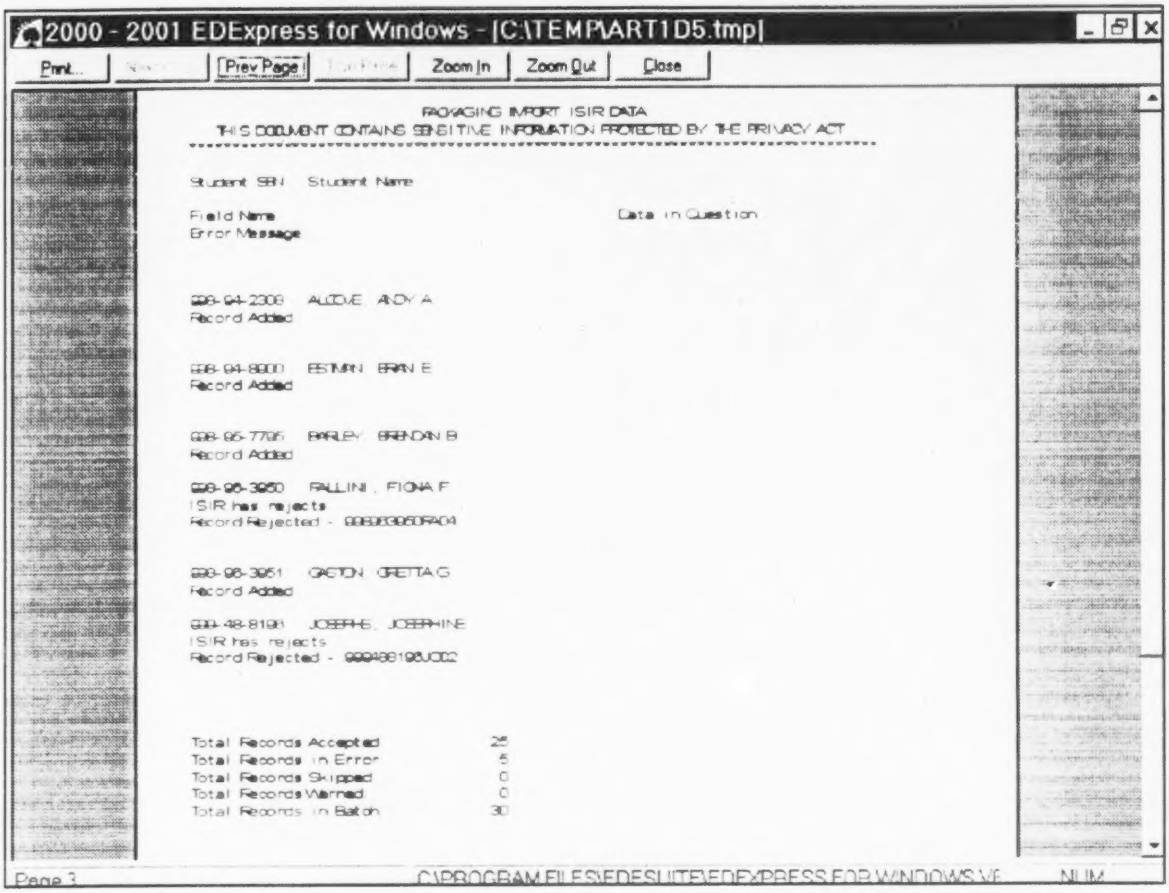
PACKAGING IMPORT ISIR DATA

100%

Time Elapsed 00:00:21

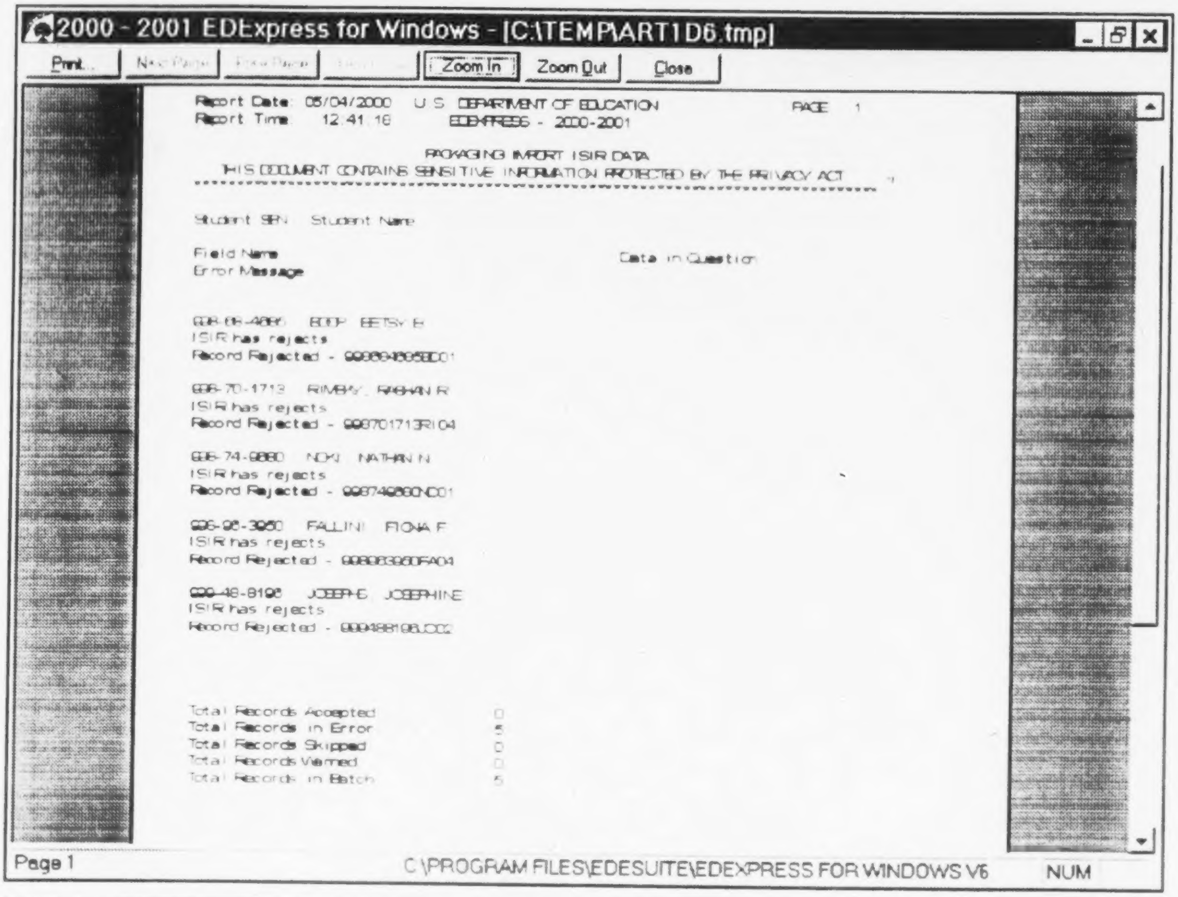
If you selected the **Print a List of Imported Packaging Records?** option, the edit reports includes a complete list of each ISIR record and its import status (add or reject) along with summary totals

An edit report generates


2000 - 2001 EDExpress for Windows - [C:\TEMP\ART1D5.tmp]
Print...
Prev Page
Zoom In
Zoom Out
Close
Page 3
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

```
                    PACKAGING IMPORT ISIR DATA
   THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
-------------------------------------------------------------------------------

Student SSN    Student Name

Field Name                                          Data in Question
Error Message


998-94-2308    ALCOVE  ANDY A
Record Added


998-94-8800    ESTMAN  BRIAN E
Record Added


998-95-7795    BARLEY  BRENDAN B
Record Added

998-96-3950    FALLINI , FIONA F
ISIR has rejects
Record Rejected -  998963950FA04


998-96-3951    GASTON  GRETTA G
Record Added

998-48-8198    JOSEPHS , JOSEPHINE
ISIR has rejects
Record Rejected -  998488198JO02



Total Records Accepted          25
Total Records in Error           5
Total Records Skipped            0
Total Records Warned             0
Total Records in Batch          30
```

The edit report lists only the rejected records and summary totals


2000 - 2001 EDExpress for Windows - [C:\TEMP\ART1D6.tmp]
Print...
Next Page
Prev Page
Zoom In
Zoom Out
Close
Page 1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

```
Report Date: 05/04/2000   U.S. DEPARTMENT OF EDUCATION              PAGE   1
Report Time:   12:41:16        EDEXPRESS - 2000-2001

                          PACKAGING IMPORT ISIR DATA
   THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
--------------------------------------------------------------------------------

Student SSN   Student Name

Field Name                                        Data in Question
Error Message


998-86-4886   BOOP  BETSY B
ISIR has rejects
Record Rejected - 998864886BO01

998-70-1713   RIMBY  RASHAN R
ISIR has rejects
Record Rejected - 998701713RI04

998-74-9880   NOKI  NATHAN N
ISIR has rejects
Record Rejected - 998749880NO01

998-98-3960   FALLINI  FIONA F
ISIR has rejects
Record Rejected - 998983960FA04

999-48-8198   JOSEPHS  JOSEPHINE
ISIR has rejects
Record Rejected - 999488198JO02



Total Records Accepted           0
Total Records in Error           5
Total Records Skipped            0
Total Records Viewed             0
Total Records in Batch           5
```

Importing External Data

In addition to manual entry and ISIR import, you can create student packaging records by importing data from external sources, such as your school's records. You also can import external data to change or update fields in existing records. All data you import must conform to EDExpress record layouts. Your information systems technical support staff should be able to assist you with this. You can print the various record layouts for each type of data import within the Packaging module. Record layouts are also published in the Packaging Technical Reference. Once you create the appropriate file in the format specified by the record layout, you can import it into EDExpress.

The Packaging module of EDExpress supports two methods of importing data from an external source:

- Import: External add
- Import: External change

[Slide 3-6]

Import: External Add

The external add import is most useful for students who will not file a FAFSA. The import creates student packaging records in a process very similar to the ISIR import. First, the imported data creates a demographic record in the Apps module. Then, this data is transparently moved to the Packaging module.

When processing an external add import, populate as many of the fields in the student's demographic and packaging records that are applicable to and available from your information source. To create the demographic record, the required fields include the student's SSN, Name ID, and Transaction Number. To create the packaging record, the required fields include the academic year profile, budget code, and year in school.

[Slides 3-7 and 3-8]

Import: External Change

The external change import updates existing student packaging records, regardless of the method used to create them (manual entry, ISIR import, or external add). An example of an external change that you might want to import is a change of address not reported on an ISIR.

[Slide 3-9]

Import: User-Defined Data

A third method of importing data is available. This function can be used to update any user-defined fields you create in User Database. The process is similar to external add and external change imports, except that it occurs in the Global module. (User-defined data is available to all modules of EDExpress.) The record layout for User Data Import is available in the Global module via the print function.

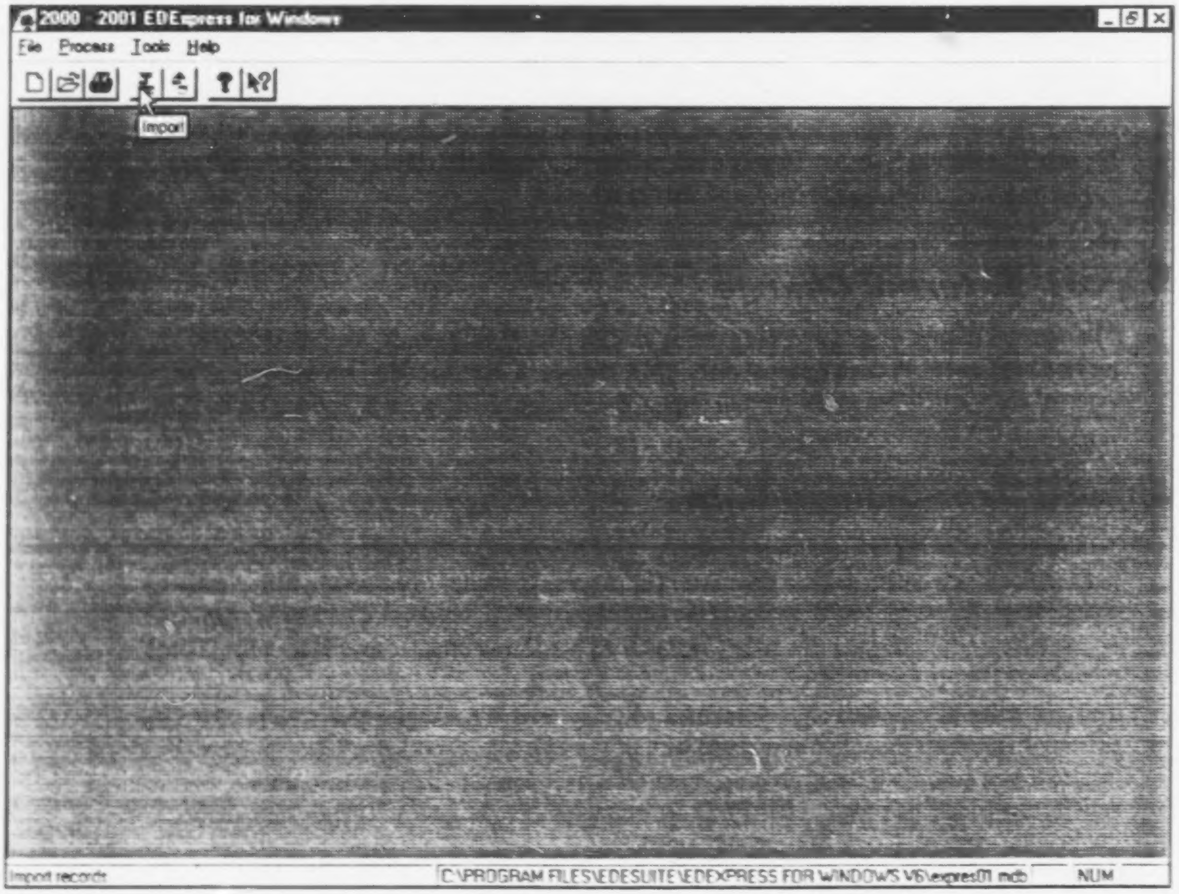
You can define as user data any information you may need in packaging that does not have an existing EDExpress data field associated with it. For example, user-defined data may be needed if you award aid based on program or GPA or if you use EDExpress to track satisfactory academic progress (SAP). Other examples include student's major, cumulative grade point average, (GPA) and credits earned.

[Slide 3-10]

Importing External Data to Create Packaging Records

From the main menu, click the ***Import*** *icon*

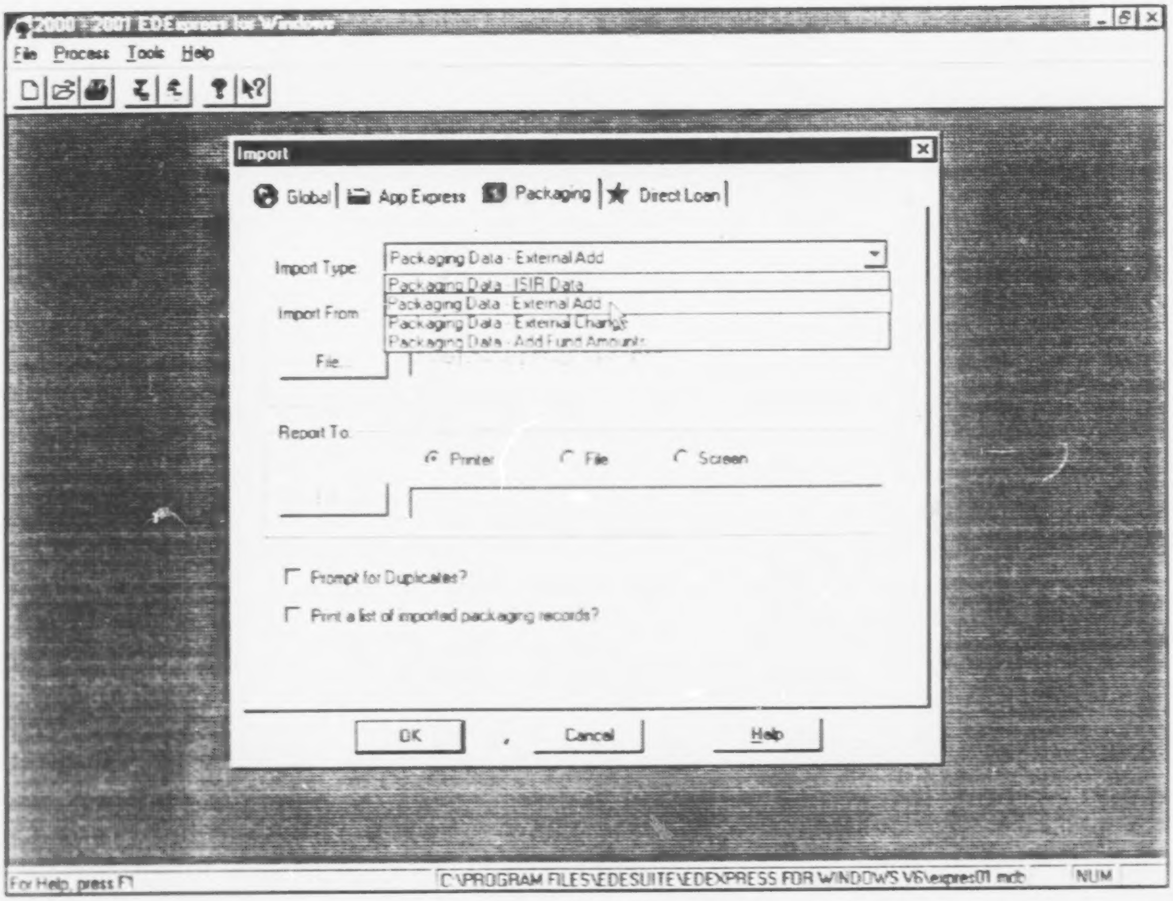
Since the method used to import, add, or change files is similar, we cover only external add in detail


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Import
Import records
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

Click the ***Packaging*** *tab*

Click the down arrow in the ***Import Type*** *box*

Select Packaging Data External Add



Import Type: Packaging Data - External Add

Report To: ● Printer ○ File ○ Screen

☐ Prompt for Duplicates?

☐ Print a list of imported packaging records?

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

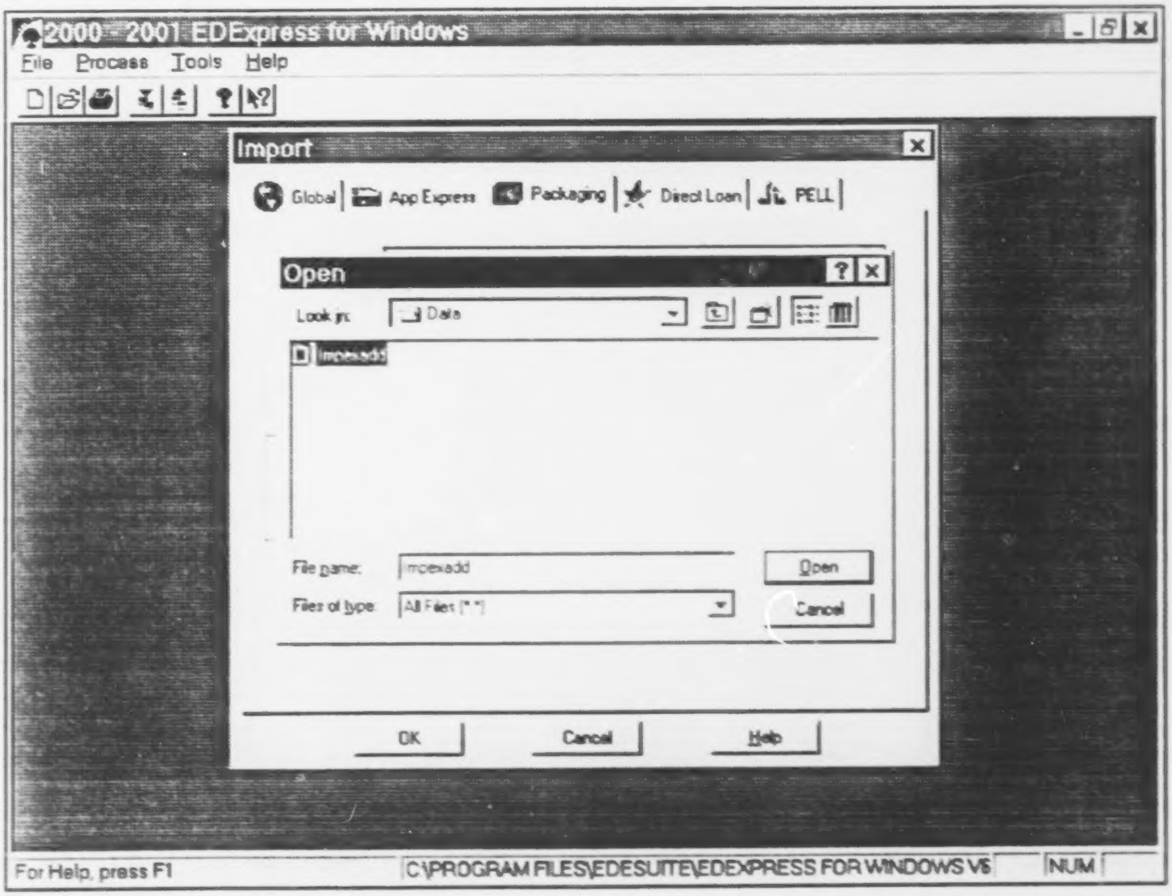
2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Import
Global
App Express
Packaging
Direct Loan
Packaging Data - ISIR Data
Packaging Data - External Add
Packaging Data - External Change
Packaging Data - Add Fund Amounts
Import From
File...
OK
Cancel
Help
NUM

Click ***File***

Change the ***Files of Type*** *to All Files*

Locate and select the file to import

Click ***Open***


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Import
Global
App Express
Packaging
Direct Loan
PELL
Open
impexadd
Open
Cancel
OK
Cancel
Help
NUM

Look in: Data

File name: impexadd

Files of type: All Files (*.*)

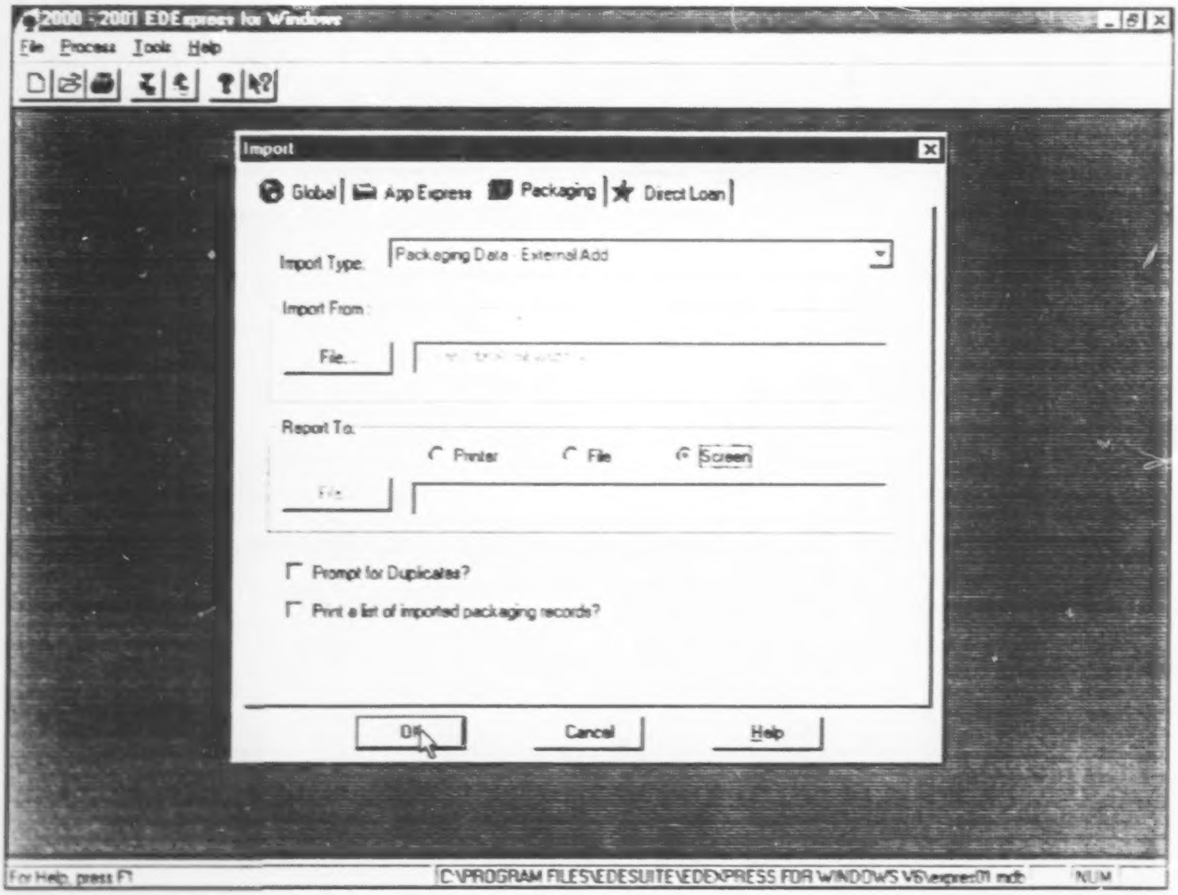
For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6

Click ***Print Report to Screen***

Click ***OK***

Skip the ***Prompt for Duplicate*** *and* ***Print a List of Imported Packaging Records?*** *options*


2000 - 2001 EDExpress for Windows
File Process Tools Help
Import
Global
App Express
Packaging
Direct Loan
Import From :
File...
File...
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

Import Type: Packaging Data - External Add

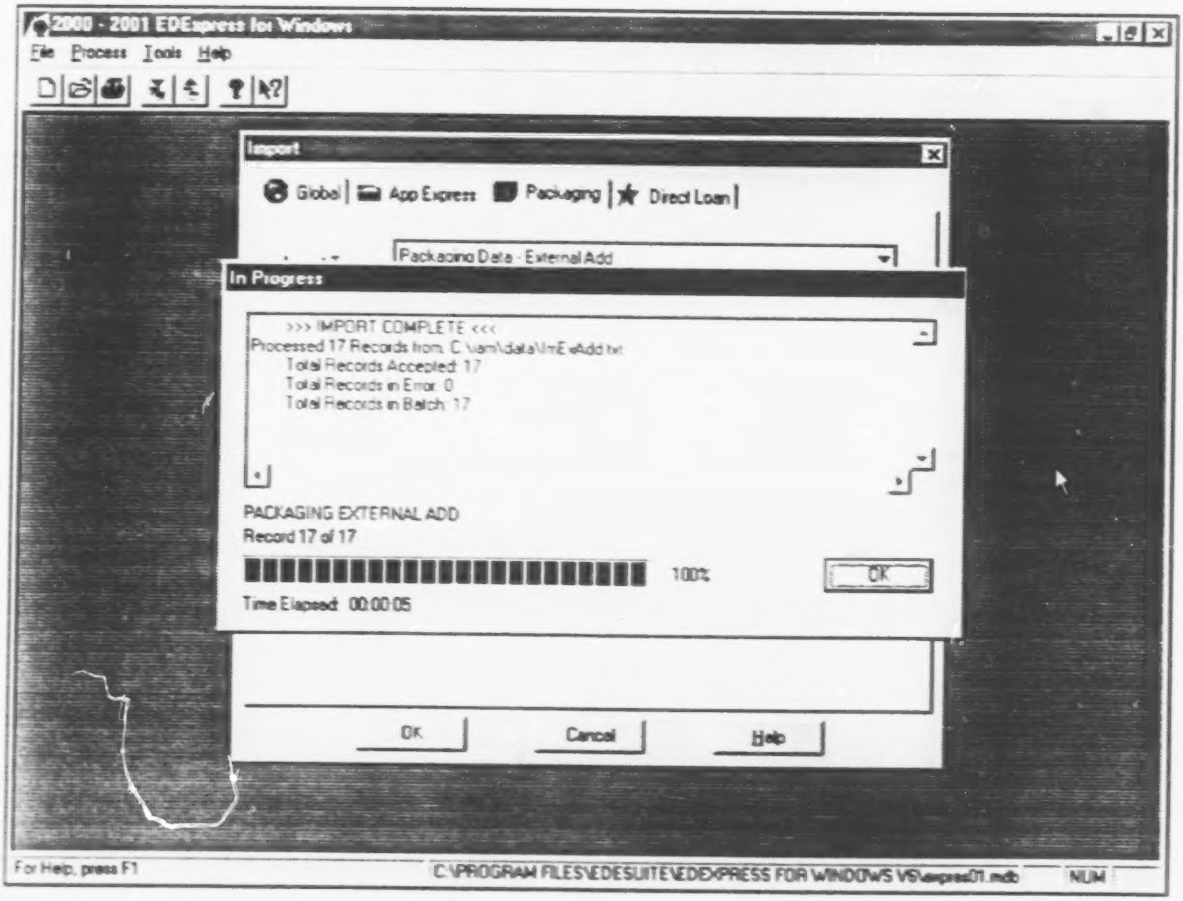
Report To: ○ Printer ○ File ● Screen

☐ Prompt for Duplicates?

☐ Print a list of imported packaging records?

BEST COPY AVAILABLE

The progress bar shows the import was successfully completed.


2000 - 2001 EDExpress for Windows
File Process Tools Help
Import
Global
App Express
Packaging
Direct Loan
Packaging Data - External Add
In Progress
OK
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\express01.mdb
NUM

```
      >>> IMPORT COMPLETE <<<
Processed 17 Records from: C:\sam\data\ImExAdd.txt
      Total Records Accepted: 17
      Total Records in Error: 0
      Total Records in Batch: 17
```

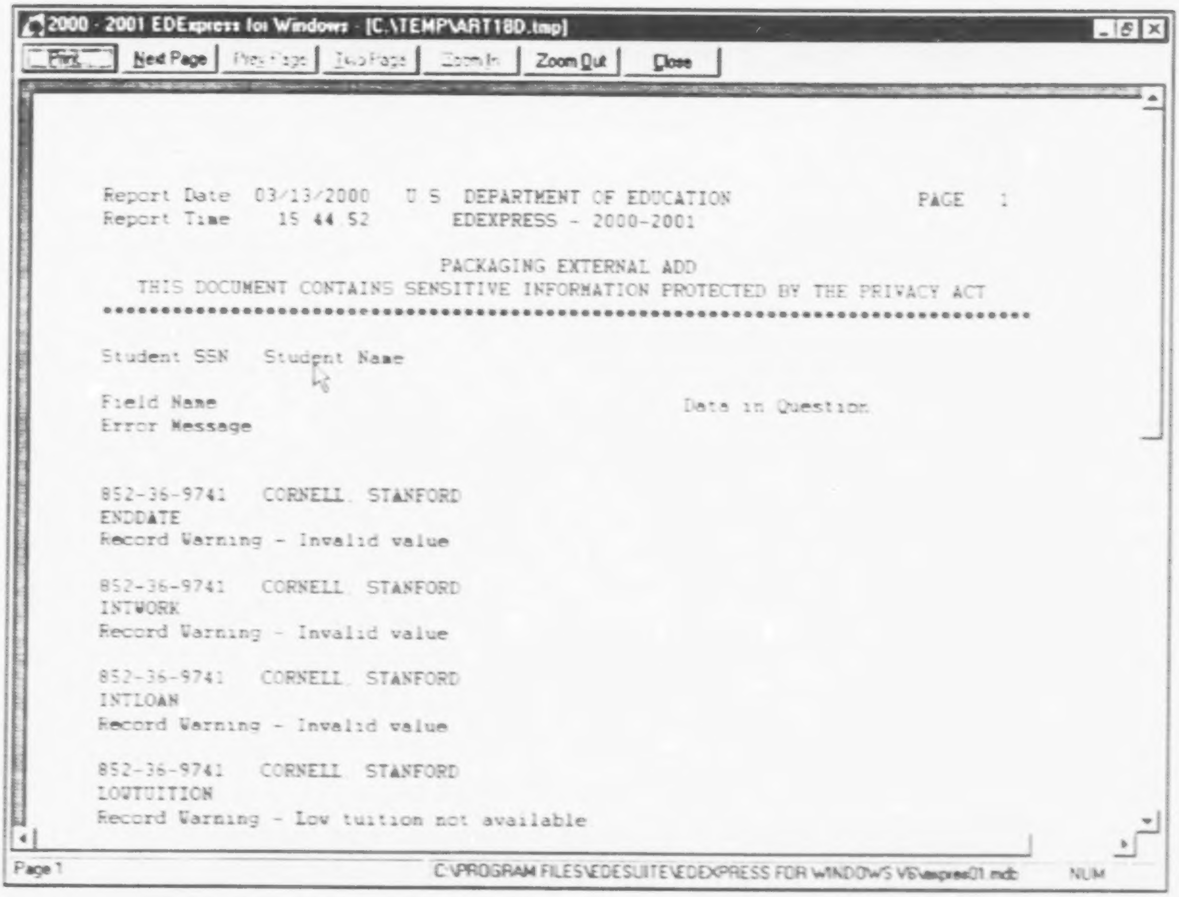
PACKAGING EXTERNAL ADD
Record 17 of 17
100%
Time Elapsed: 00:00:05

The report warns you of blank or invalid field content.

Click ***OK*** *to view the report.*

Click anywhere on the report page to zoom in for closer view.

When finished viewing the report, click ***Close*** *or* ***Print***


2000 - 2001 EDExpress for Windows - [C:\TEMP\ART18D.tmp]
Print
Next Page
Prev Page
Two Page
Zoom In
Zoom Out
Close
Page 1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

```
Report Date  03/13/2000   U S  DEPARTMENT OF EDUCATION              PAGE   1
Report Time    15 44 52        EDEXPRESS - 2000-2001

                          PACKAGING EXTERNAL ADD
   THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
**************************************************************************

Student SSN   Student Name

Field Name                                          Data in Question
Error Message


852-36-9741   CORNELL, STANFORD
ENDDATE
Record Warning - Invalid value

852-36-9741   CORNELL, STANFORD
INTWORK
Record Warning - Invalid value

852-36-9741   CORNELL, STANFORD
INTLOAN
Record Warning - Invalid value

852-36-9741   CORNELL, STANFORD
LOWTUITION
Record Warning - Low tuition not available
```

Working with Packaging Data

Every student record in the EDExpress Apps database has an accessible Awards tab, even those ISIR records not imported into the Packaging database. You can tell whether records in the Apps database also have Packaging data by looking at the information displayed on the Awards tab.

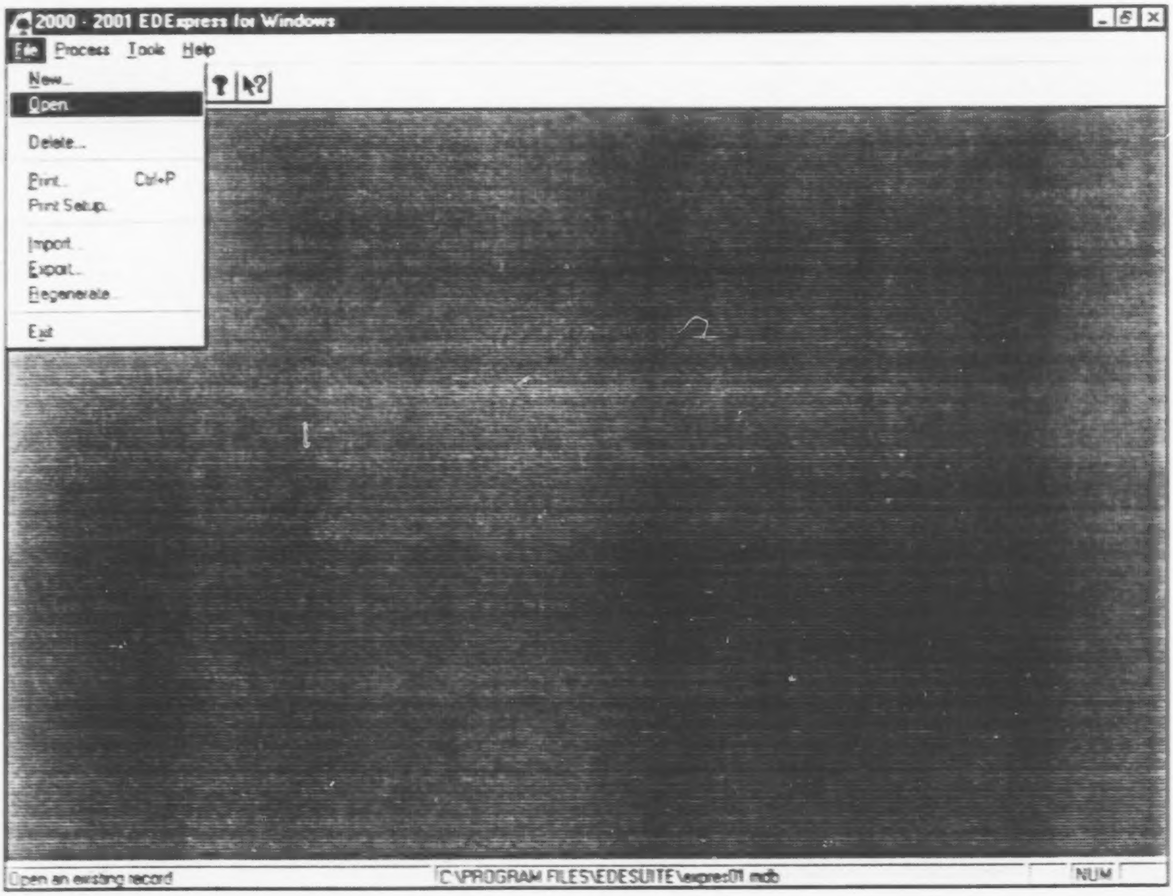
Let's look at the Awards tab for two of the records from the Apps database that we selected for the ISIR import—one that was added to the Packaging database and one that rejected.

Opening Packaging Records

You open Packaging records just as you would any other record in the Apps database

To open a student record

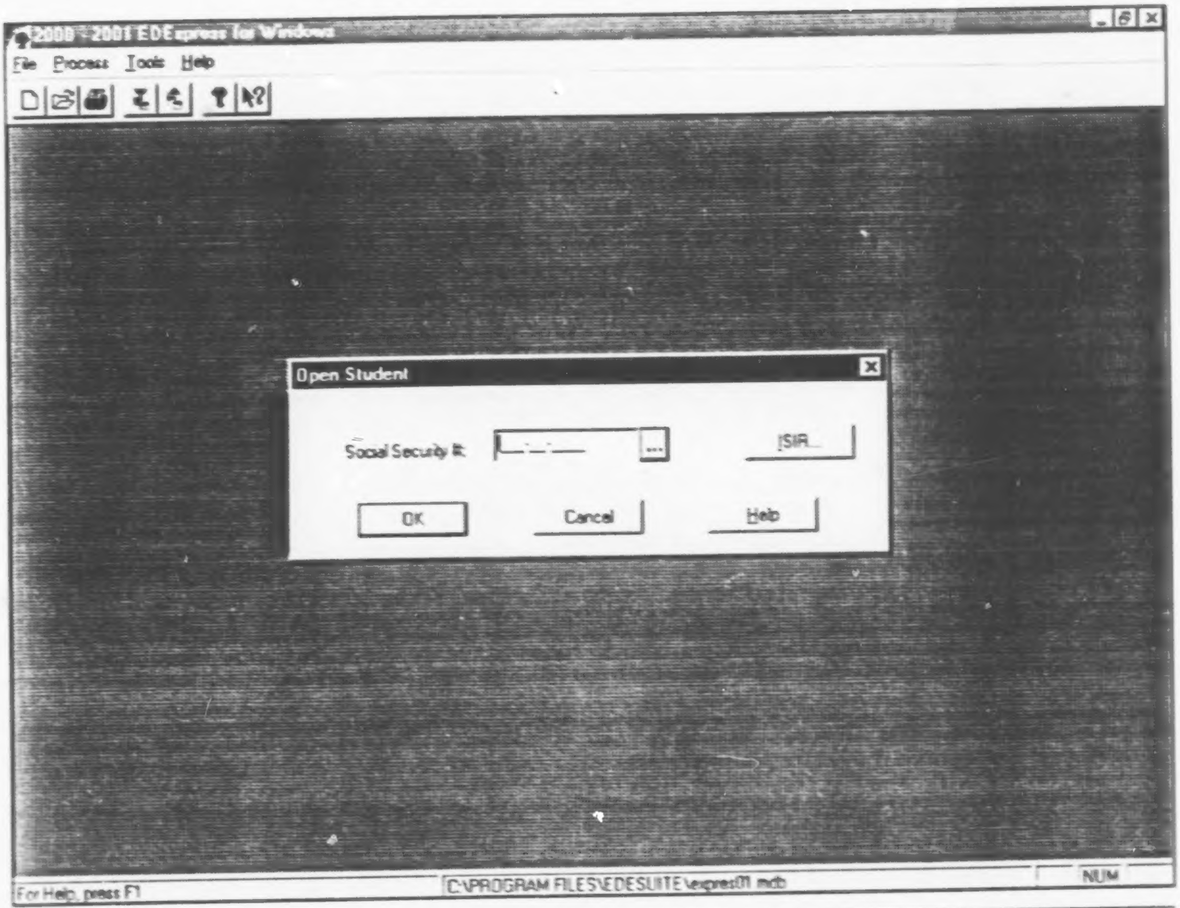
*Select **File/Open***


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
New...
Open...
Delete...
Print... Ctrl+P
Print Setup...
Import...
Export...
Regenerate...
Exit
NUM

Open an existing record

C:\PROGRAM FILES\EDESUITE\expres01.mdb

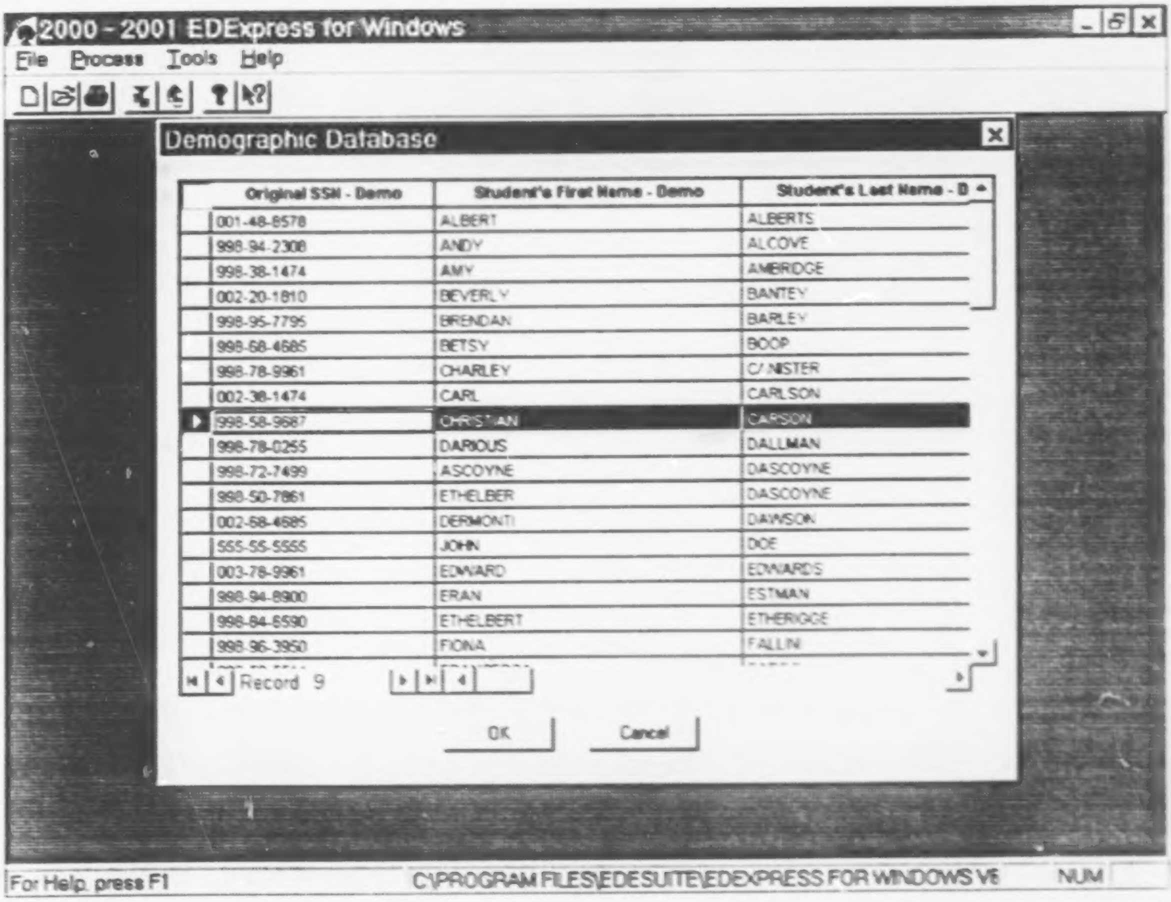
The Open Student dialog box displays


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Open Student
Social Security #:
ISIR...
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\expres01.mdb
NUM

Enter the student's Social Security Number

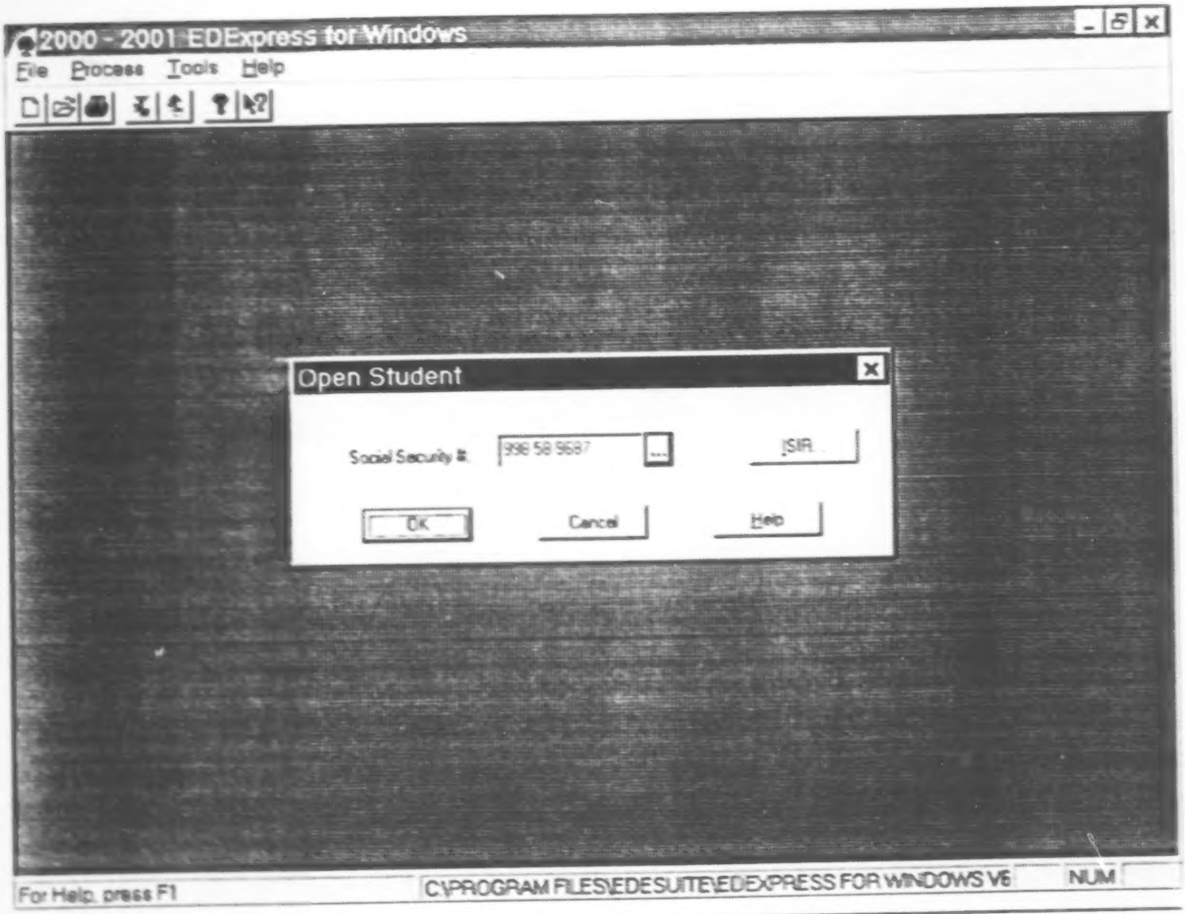
If you don't know the Social Security Number, click the ***ellipsis*** *button to display a list of names in the Apps database*

Click the desired ***student record****, then click* ***OK***


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Demographic Database
Record 9
OK
Cancel
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

Original SSN - Demo	Student's First Name - Demo	Student's Last Name - D
001-48-8578	ALBERT	ALBERTS
998-94-2308	ANDY	ALCOVE
998-38-1474	AMY	AMBRIDGE
002-20-1810	BEVERLY	BANTEY
998-95-7795	BRENDAN	BARLEY
998-68-4685	BETSY	BOOP
998-78-9961	CHARLEY	CANISTER
002-38-1474	CARL	CARLSON
998-58-9687	CHRISTIAN	CARSON
998-78-0255	DARIOUS	DALLMAN
998-72-7499	ASCOYNE	DASCOYNE
998-50-7861	ETHELBER	DASCOYNE
002-68-4685	DERMONTI	DAWSON
555-55-5555	JOHN	DOE
003-78-9961	EDWARD	EDWARDS
998-94-8900	ERAN	ESTMAN
998-84-6590	ETHELBERT	ETHERIGGE
998-96-3950	FIONA	FALLIN

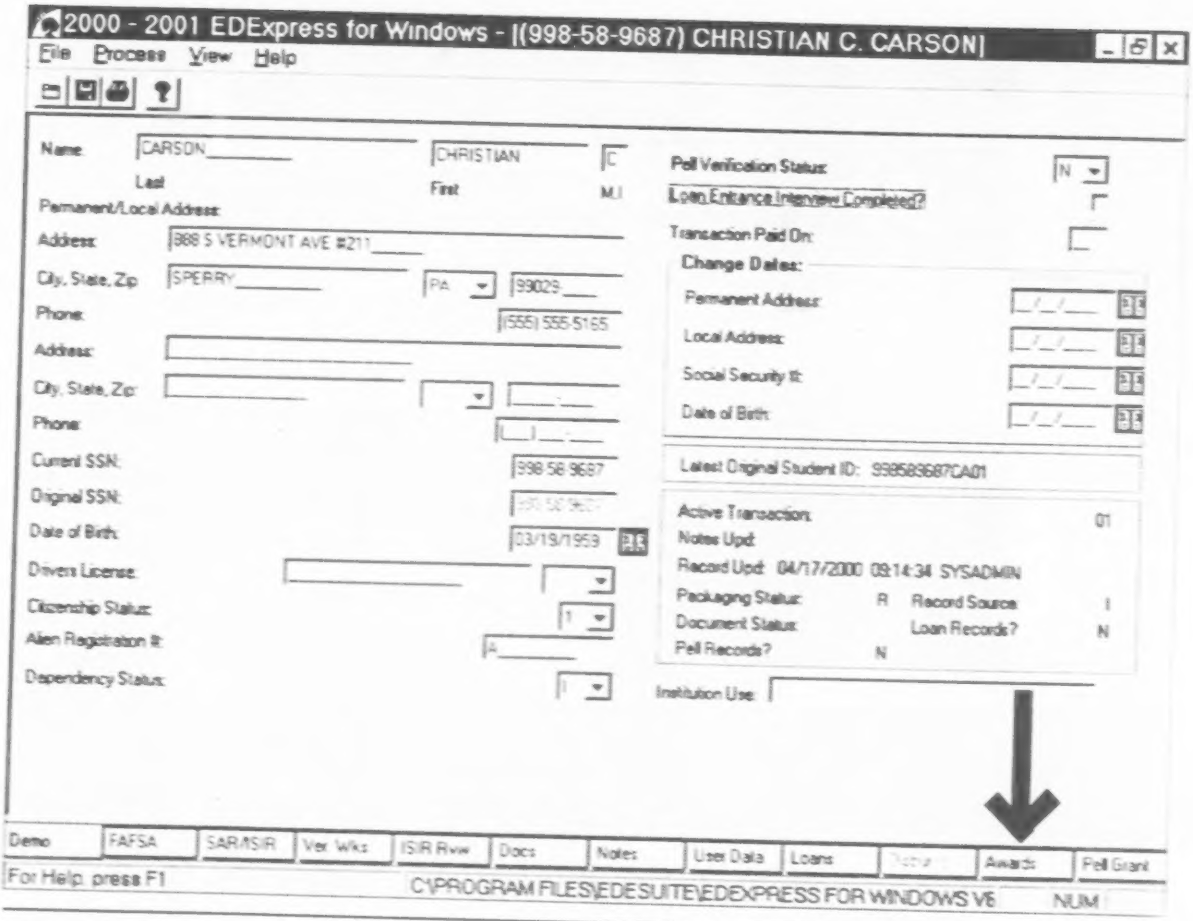
*Click **OK** to open the record*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Open Student
ISIR...
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

Social Security #: 998 58 9687

The student's Demographic record displays

Click the **Awards** tab to view the packaging information for this student



2000 - 2001 EDExpress for Windows - [(998-58-9687) CHRISTIAN C. CARSON]

File
Process
View
Help

Name: CARSON (Last) CHRISTIAN (First) C (M.I.)

Permanent/Local Address:

Address: 888 S VERMONT AVE #211

City, State, Zip: SPERRY PA 99029

Phone: (555) 555-5165

Address:

City, State, Zip:

Phone:

Current SSN: 998 58 9687

Original SSN: 998 58 9687

Date of Birth: 03/19/1959

Drivers License:

Citizenship Status: 1

Alien Registration #: A

Dependency Status: I

Pell Verification Status: N

Loan Entrance Interview Completed? ☐

Transaction Paid On:

Change Dates:

Permanent Address: __/__/____

Local Address: __/__/____

Social Security #: __/__/____

Date of Birth: __/__/____

Latest Original Student ID: 998589687CA01

Active Transaction: 01

Notes Upd:

Record Upd: 04/17/2000 09:14:34 SYSADMIN

Packaging Status: R

Record Source: I

Document Status:

Loan Records? N

Pell Records? N

Institution Use:

Demo
FAFSA
SAR/ISIR
Ver. Wks
ISIR Rvw
Docs
Notes
User Data
Loans
Awards
Pell Grant
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

Awards Tab Review

Because the Packaging icon is displayed, you can tell that a Packaging record exists in the database for this student

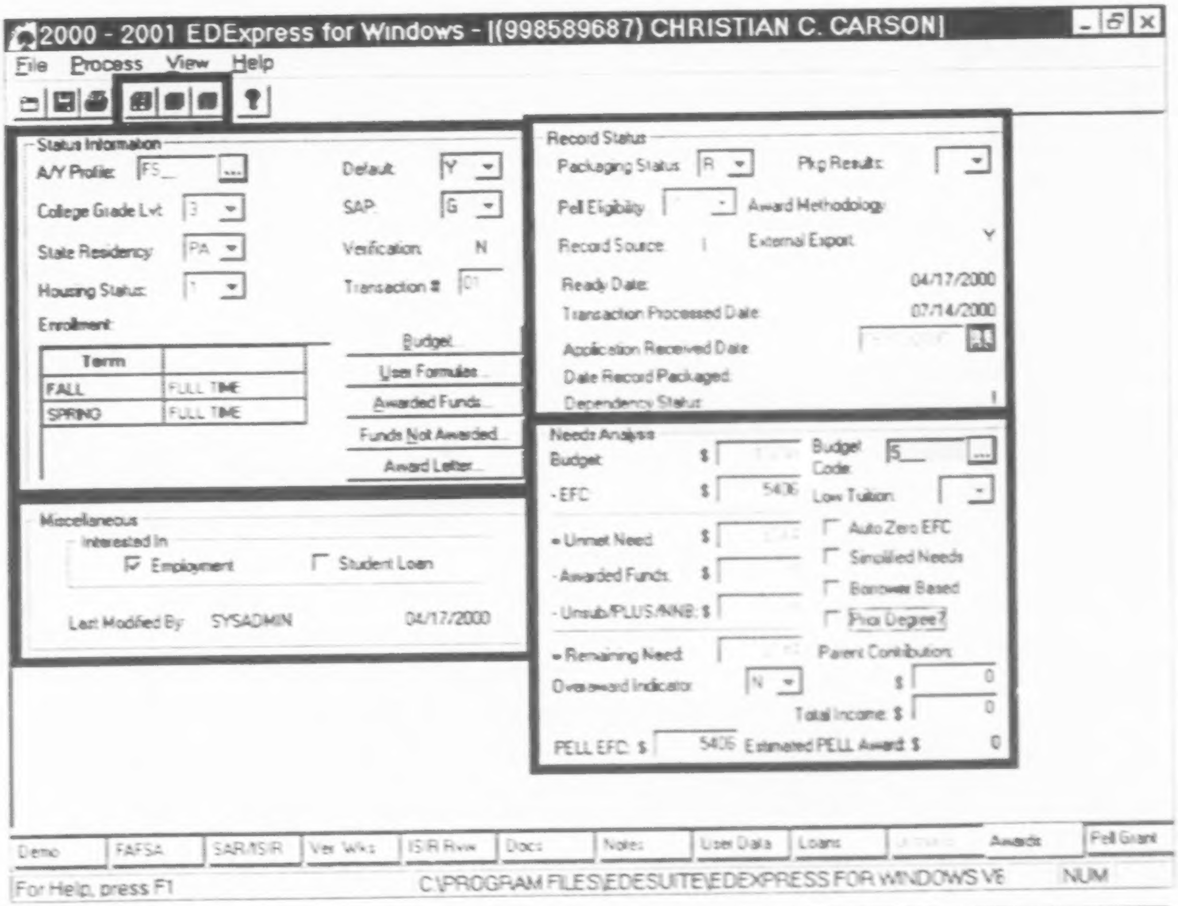
Information on the Awards tab is grouped into four areas on the screen

- Status Information
- Miscellaneous
- Record Status
- Needs Analysis

[Slide 3-11]

Any information displayed in the various fields for each area was imported from the ISIR record and/or calculated during the import process according to the options you selected

Notice that there are icons in the shape of boxes, or packages. Selecting these icons allows you to perform 3 functions Package, Unpackage, and Repackage When displayed, the icons are in color Package is green, Unpackage is red, Repackage is yellow



2000 - 2001 EDExpress for Windows - [(998589687) CHRISTIAN C. CARSON]

Status Information
A/Y Profile: FS
College Grade Lvl: 3
State Residency: PA
Housing Status: 1
Default: Y
SAP: G
Verification: N
Transaction #: 01
Enrollment

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous
Interested In
☑ Employment ☐ Student Loan
Last Modified By: SYSADMIN 04/17/2000

Record Status
Packaging Status: R
Pkg Results:
Pell Eligibility:
Award Methodology:
Record Source: I
External Export: Y
Ready Date: 04/17/2000
Transaction Processed Date: 07/14/2000
Application Received Date
Date Record Packaged:
Dependency Status: I

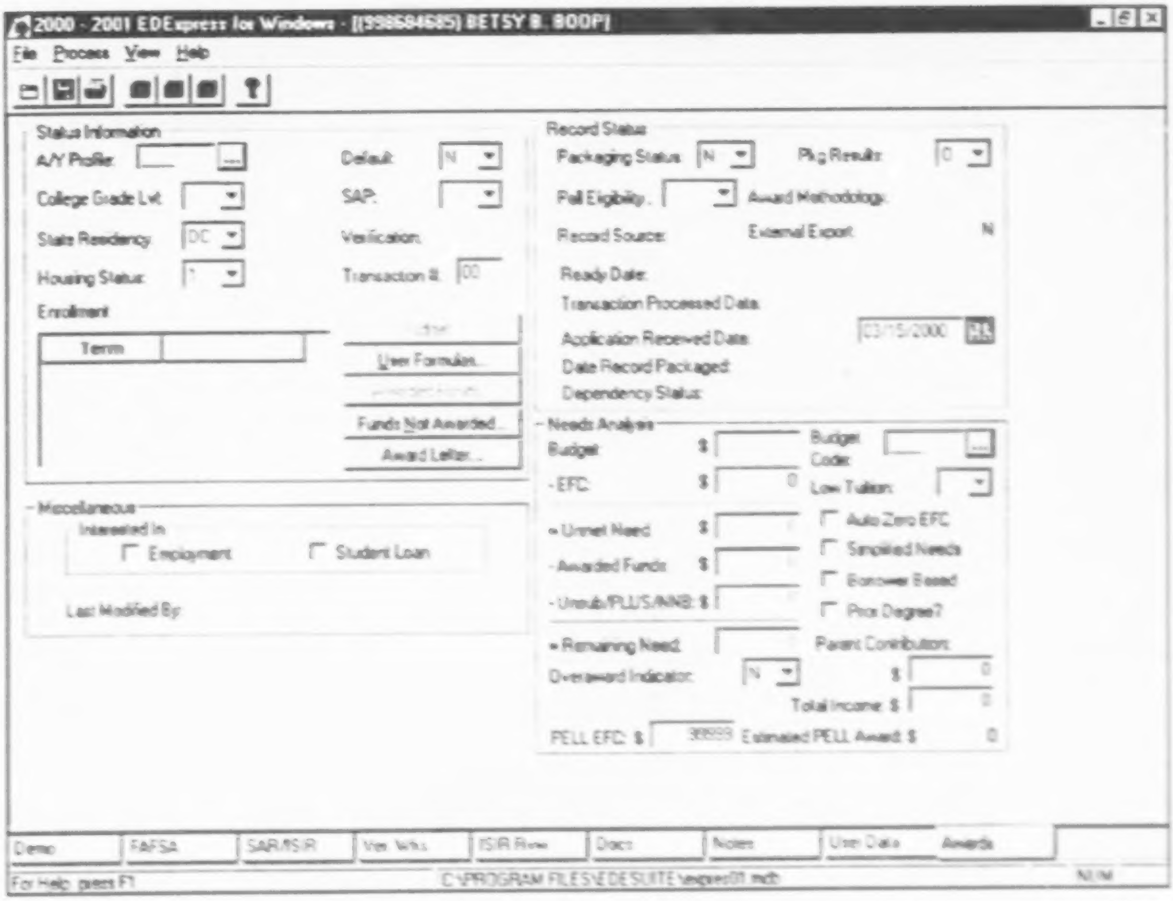
Needs Analysis
Budget $
Budget Code: 5
- EFC $ 5406
Low Tuition:
= Unmet Need $
- Awarded Funds $
- Unsub/PLUS/NNB: $
☐ Auto Zero EFC
☐ Simplified Needs
☐ Borrower Based
☐ Prior Degree?
= Remaining Need
Parent Contribution: $ 0
Overaward Indicator: N
Total Income: $ 0
PELL EFC: $ 5406 Estimated PELL Award: $ 0

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6 NUM

This is an example of student who has a rejected ISIR record that failed to import into the Packaging database

Although the Awards tab is accessible, the Packaging icon is grayed out

The only data displayed are a couple of fields from the student's demographic record from the Apps database


File
Process
View
Help
Status Information
Enrollment
Term
Other
User Formulas...
Unmet Need Funds...
Funds Not Awarded...
Award Letter...
Miscellaneous
Interested In
☐ Employment
☐ Student Loan
Record Status
Needs Analysis
☐ Auto Zero EFC
☐ Simplified Needs
☐ Borrower Based
☐ Prior Degree?
Demo
FAFSA
SAR/ISIR
Ver. Wks
ISIR Rvw
Docs
Notes
User Data
Awards
NUM

2000 - 2001 EDExpress for Windows - [(998684685) BETSY B. BOOP]

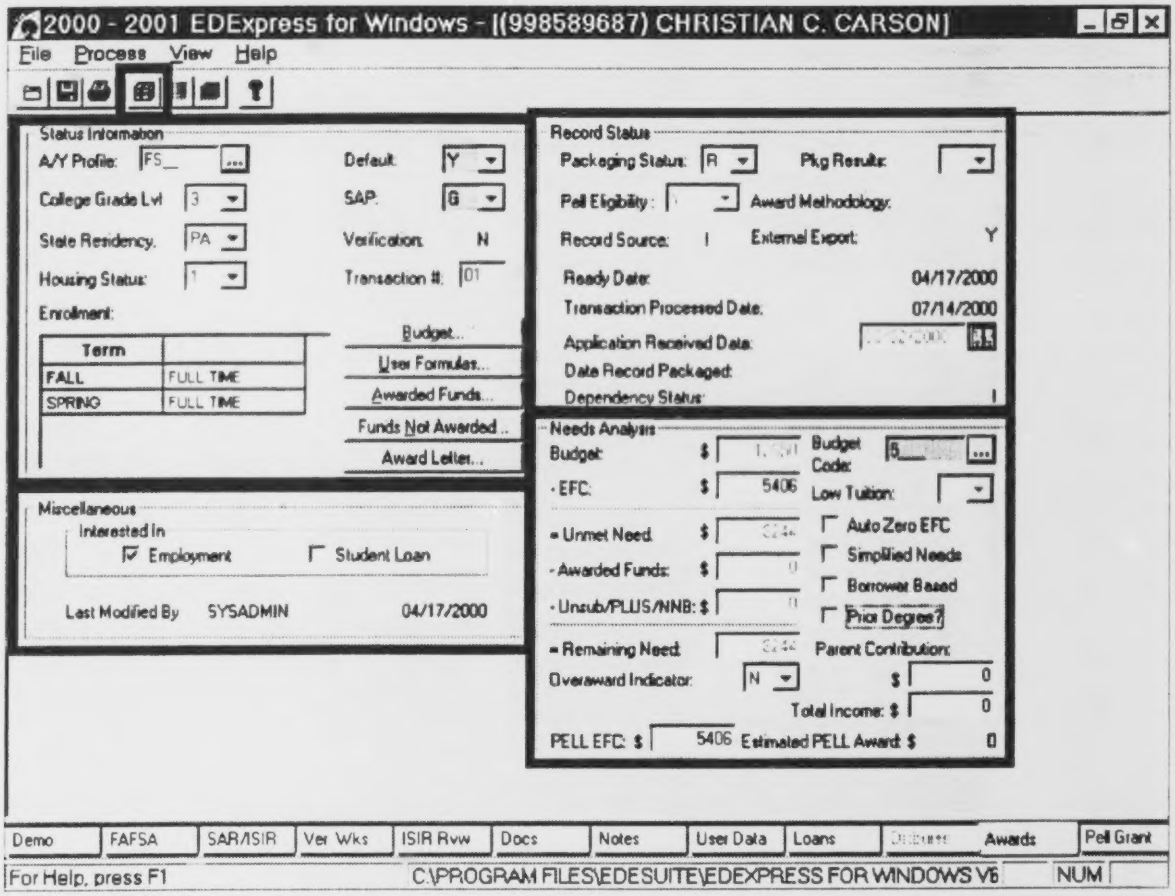
A/Y Profile:
College Grade Lvl:
State Residency: DC
Housing Status: 1
Default: N
SAP:
Verification:
Transaction #: 00
Last Modified By:

Packaging Status: N
Pkg Results: 0
Pell Eligibility:
Award Methodology:
Record Source:
External Export: N
Ready Date:
Transaction Processed Date:
Application Received Date: 03/15/2000
Date Record Packaged:
Dependency Status:

Budget: $
Budget Code:
- EFC: $ 0
Low Tuition:
= Unmet Need: $
- Awarded Funds: $
- Unsub/PLUS/NNB: $
= Remaining Need:
Overaward Indicator: N
Parent Contribution: $ 0
Total Income: $ 0
PELL EFC: $ 99999
Estimated PELL Award: $ 0

For Help, press F1
C:\PROGRAM FILES\EDESUITE\expres01.mdb

Let's go back to our first example of the student with a packaging record, and look at the fields of each of the four areas displayed on the Awards tab screen. It's important to note that you can override the value of any field that is not grayed out.


2000 - 2001 EDExpress for Windows - [(998589687) CHRISTIAN C. CARSON]
File
Process
View
Help
Budget...
User Formulas...
Awarded Funds...
Funds Not Awarded...
Award Letter...
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Loans
Awards
Pell Grant
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

Status Information

A/Y Profile: FS_

College Grade Lvl: 3

State Residency: PA

Housing Status: 1

Default: Y

SAP: G

Verification: N

Transaction #: 01

Enrollment:

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous

Interested In

☑ Employment ☐ Student Loan

Last Modified By SYSADMIN 04/17/2000

Record Status

Packaging Status: R

Pkg Results:

Pell Eligibility:

Award Methodology:

Record Source: I

External Export: Y

Ready Date: 04/17/2000

Transaction Processed Date: 07/14/2000

Application Received Date: [illegible]

Date Record Packaged:

Dependency Status: I

Needs Analysis

Budget: $ [illegible]

Budget Code: B_

- EFC: $ 5406

Low Tuition:

= Unmet Need: $ 3244

- Awarded Funds: $ 0

- Unsub/PLUS/NNB: $ 0

= Remaining Need: 3244

Overaward Indicator: N

☐ Auto Zero EFC

☐ Simplified Needs

☐ Borrower Based

☐ Prior Degree?

Parent Contribution: $ 0

Total Income: $ 0

PELL EFC: $ 5406

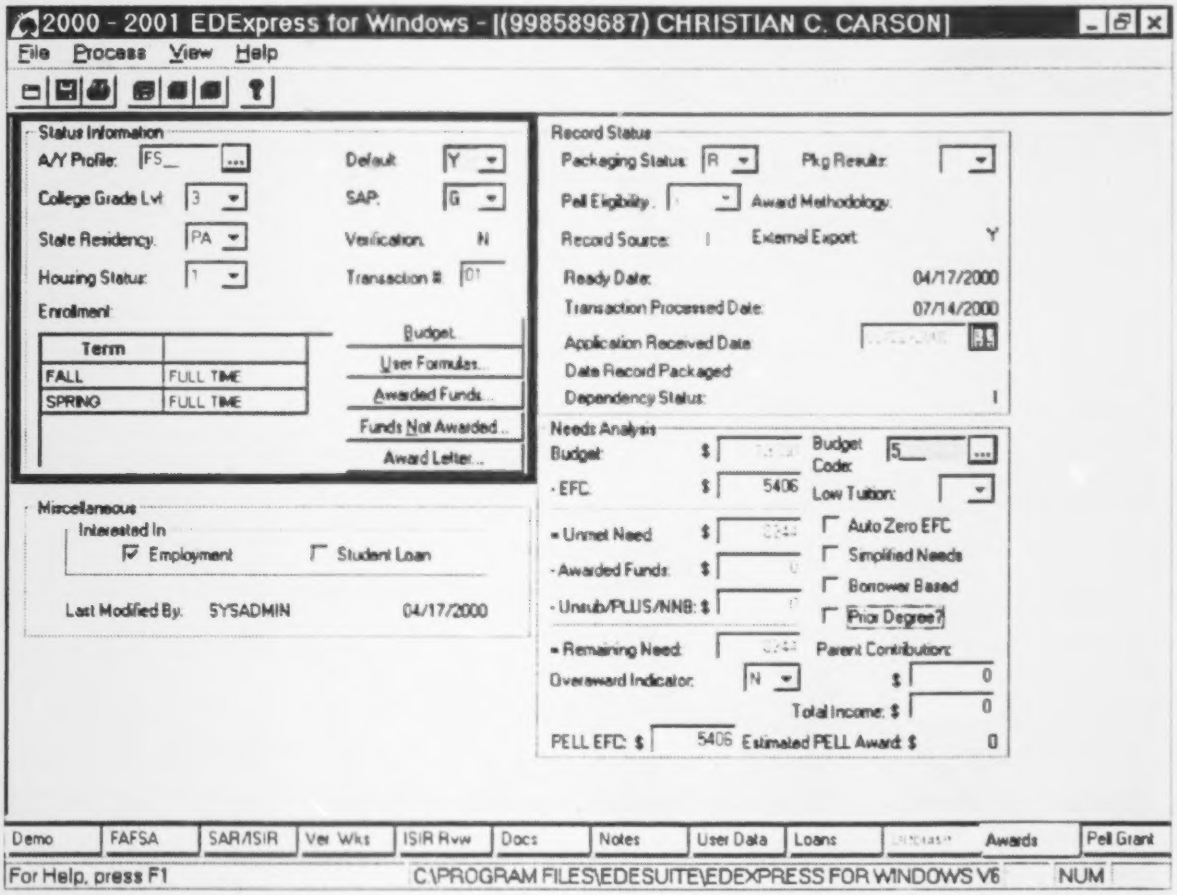
Estimated PELL Award: $ 0

Status Information

Of the fields included in this section of the Awards screen, AYP and College Grade Level values are required to create a packaging record

- **Academic Year Profile** is the AYP you assigned when the record was imported
- **College Grade Level** defaults to the value on the student's ISIR
- **State Residency** defaults to the value on the student's demographic record
- **Housing Status** is the value on the student's ISIR. For records without ISIRs, it is the default value from the Packaging System Setup
- **Enrollment** defaults to the value assigned to the AYP Setup
- **Default** is automatically populated from the ISIR. Otherwise, the system defaults to N. This field indicates whether the student is in default on an educational loan or owes a repayment on a grant
- **SAP** is the value you select to indicate the student's academic progress
- **Verification Code** is populated from the ISIR
- **Transaction Number** is the number assigned to the ISIR transaction by Central Processing System (CPS)

[Slide 3-12]



2000 - 2001 EDExpress for Windows - [(998589687) CHRISTIAN C. CARSON]

Status Information
A/Y Profile: FS_
Default: Y
College Grade Lvl: 3
SAP: G
State Residency: PA
Verification: N
Housing Status: 1
Transaction #: 01
Enrollment:

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous
Interested In
☑ Employment ☐ Student Loan
Last Modified By: SYSADMIN 04/17/2000

Record Status
Packaging Status: R
Pkg Results:
Pell Eligibility:
Award Methodology:
Record Source: I
External Export: Y
Ready Date: 04/17/2000
Transaction Processed Date: 07/14/2000
Application Received Date:
Date Record Packaged:
Dependency Status: I

Needs Analysis
Budget: $
Budget Code: 5__
- EFC: $ 5406
Low Tuition:
= Unmet Need: $
- Awarded Funds: $
- Unsub/PLUS/NNB: $
= Remaining Need:
Overaward Indicator: N
☐ Auto Zero EFC
☐ Simplified Needs
☐ Borrower Based
☐ Prior Degree?
Parent Contribution: $ 0
Total Income: $ 0
PELL EFC: $ 5406
Estimated PELL Award: $ 0

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6 NUM

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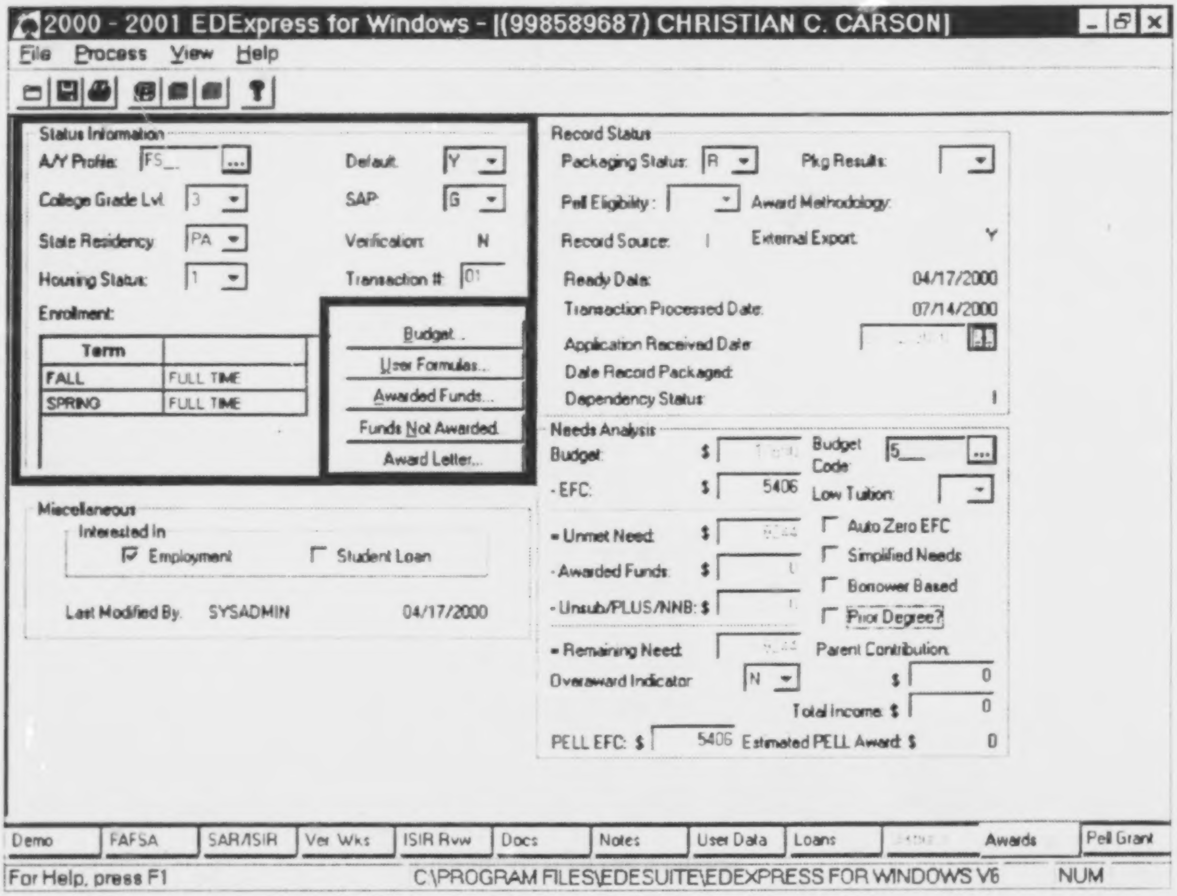
- **Budget** values default based on the Budget Code assigned
- **User-Formulas** default to the formulas you defined in Packaging Setup, along with the results for the formulas that apply to the student's record. The values are calculated in the import process if set up prior to importing into Packaging or during the save process if set up after importing into Packaging
- **Awarded Funds** displays the aid awarded as well as the student's fund decision for each fund. This field will be blank until you package the student
- **Funds Not Awarded** displays a list of funds not awarded (and the reason each fund was not awarded) within the award methodology assigned, if the student has been packaged
- **Award Letter** displays information relative to the student's award letter, if the student has been packaged

[Slide 3-13]



2000 - 2001 EDExpress for Windows - [(998589687) CHRISTIAN C. CARSON]

Status Information
A/Y Profile: FS__
Default: Y
College Grade Lvl: 3
SAP: G
State Residency: PA
Verification: N
Housing Status: 1
Transaction #: 01
Enrollment:

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous
Interested In
☑ Employment
☐ Student Loan
Last Modified By: SYSADMIN 04/17/2000

Record Status
Packaging Status: R
Pkg Results:
Pell Eligibility:
Award Methodology:
Record Source: I
External Export: Y
Ready Date: 04/17/2000
Transaction Processed Date: 07/14/2000
Application Received Date:
Date Record Packaged:
Dependency Status: I

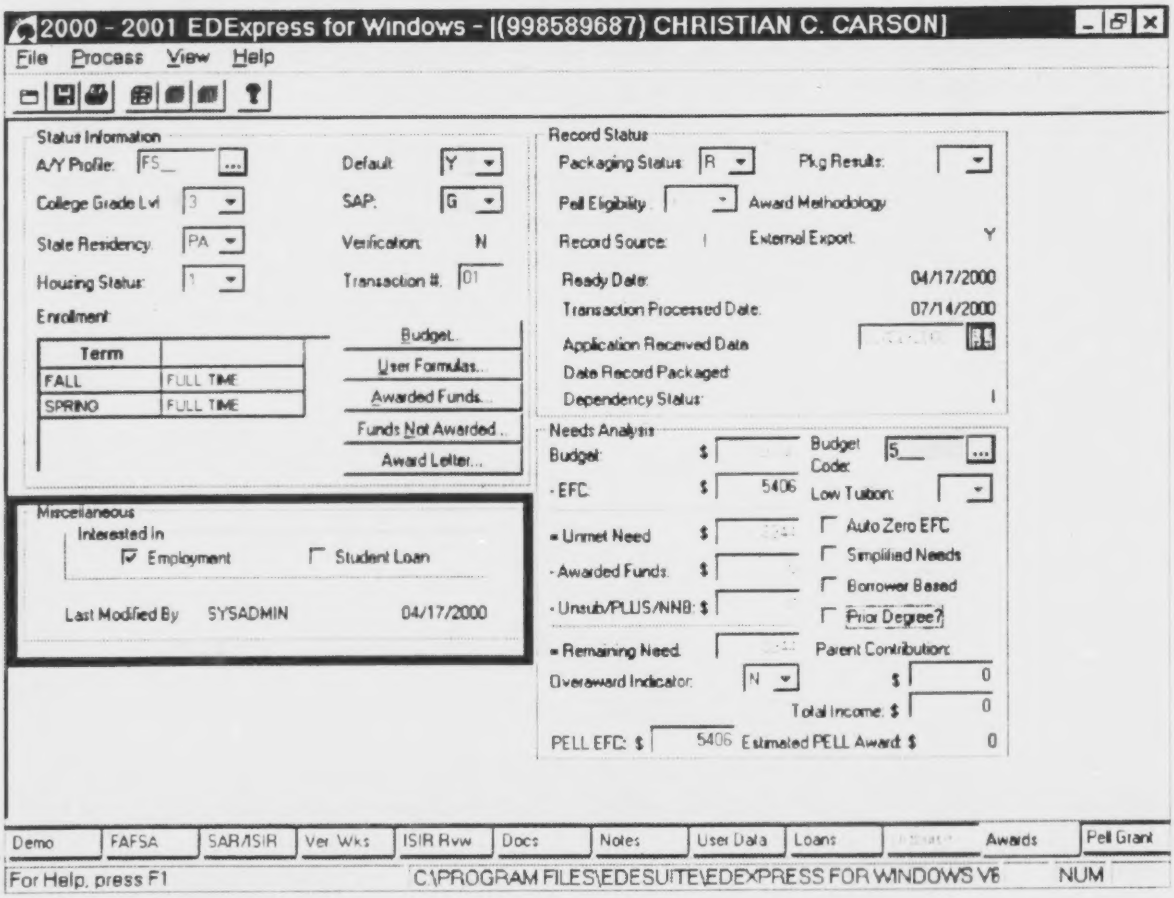
Needs Analysis
Budget: $
Budget Code: 5__
- EFC: $ 5406
Low Tuition:
= Unmet Need: $
- Awarded Funds: $
- Unsub/PLUS/NNB: $
= Remaining Need:
☐ Auto Zero EFC
☐ Simplified Needs
☐ Borrower Based
☐ Prior Degree?
Parent Contribution: $ 0
Overaward Indicator: N
Total Income: $ 0
PELL EFC: $ 5406
Estimated PELL Award: $ 0

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6 NUM

Miscellaneous

The two fields included in this area indicate the student's preference for loans and work as reported on the FASFA and updated with the ISIR import

[Slide 3-14]



2000 - 2001 EDExpress for Windows - [(998589687) CHRISTIAN C. CARSON]

File
Process
View
Help
Budget...
User Formulas...
Awarded Funds...
Funds Not Awarded...
Award Letter...
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Loans
Awards
Pell Grant

Status Information
A/Y Profile: FS_
Default: Y
College Grade Lvl: 3
SAP: G
State Residency: PA
Verification: N
Housing Status: 1
Transaction #: 01

Enrollment

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous
Interested In
☑ Employment ☐ Student Loan
Last Modified By SYSADMIN 04/17/2000

Record Status
Packaging Status: R
Pkg Results:
Pell Eligibility:
Award Methodology
Record Source: I
External Export: Y
Ready Date: 04/17/2000
Transaction Processed Date: 07/14/2000
Application Received Date
Date Record Packaged:
Dependency Status: I

Needs Analysis
Budget: $
Budget Code: 5_
- EFC: $ 5406
Low Tuition:
= Unmet Need $
☐ Auto Zero EFC
- Awarded Funds: $
☐ Simplified Needs
- Unsub/PLUS/NNB: $
☐ Borrower Based
☐ Prior Degree?
= Remaining Need
Parent Contribution: $ 0
Overaward Indicator: N
Total Income: $ 0
PELL EFC: $ 5406 Estimated PELL Award: $ 0

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6 NUM

Record Status

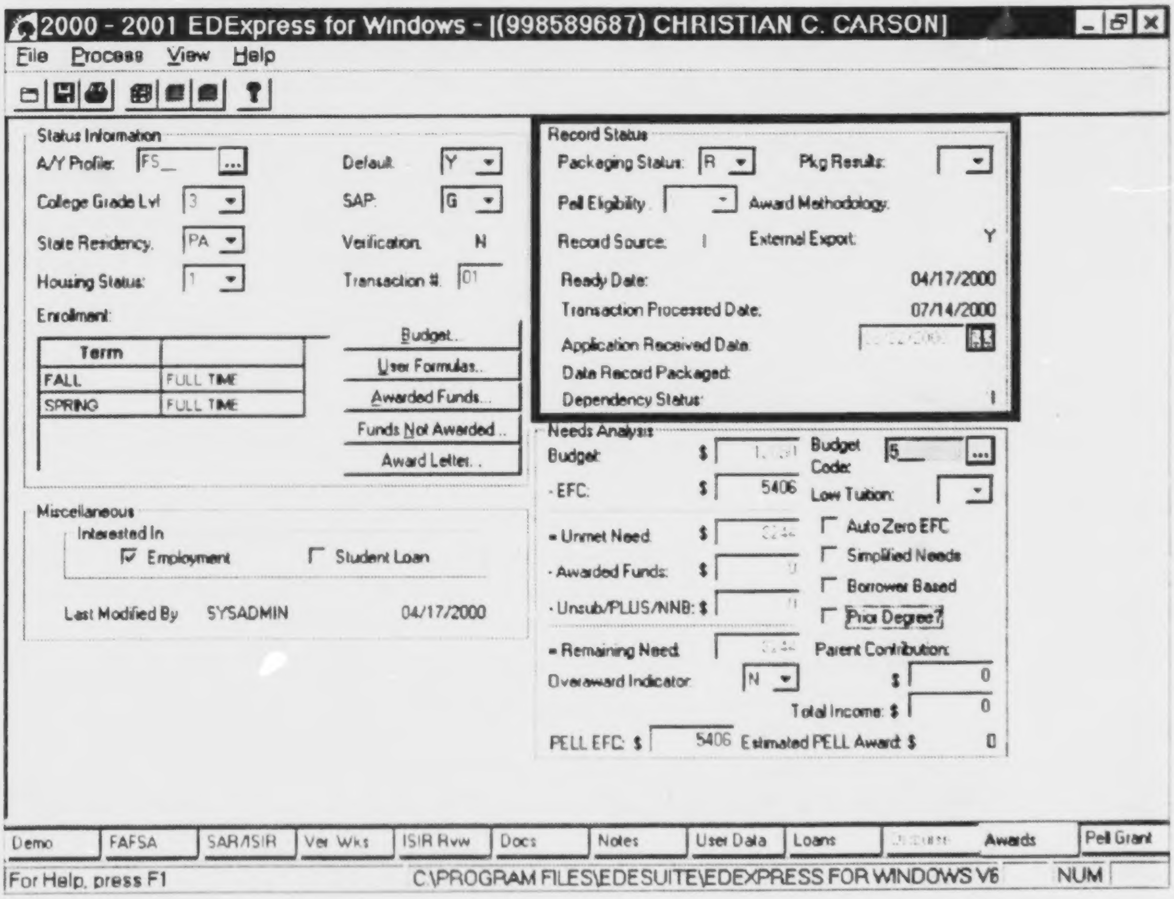
The two most important fields for monitoring what is happening with student's record are Packaging Status and Pkg. Results.

- **Packaging Status** indicates the current status of the record and displays one of the following codes:

  P = Packaged
  R = Ready to package
  N = Not ready to package
  U = Unpackaged
  M = Manually
  H = Hand packaged

  You can manually update the Packaging Status field only when the Packaging Status is R or U.

  When you manually adjust awards packaged by the system, the Packaging Status defaults to M. When you manually add awards (or hand package the student) to indicate that the student is packaged, update the Packaging Status to H.



2000 - 2001 EDExpress for Windows - [(998589687) CHRISTIAN C. CARSON]

File Process View Help

Status Information
A/Y Profile: FS_
Default: Y
College Grade Lvl: 3
SAP: G
State Residency: PA
Verification: N
Housing Status: 1
Transaction #: 01

Enrollment:

Term	
FALL	FULL TIME
SPRING	FULL TIME

Budget...
User Formulas...
Awarded Funds...
Funds Not Awarded...
Award Letter...

Miscellaneous
Interested In
☑ Employment ☐ Student Loan
Last Modified By SYSADMIN 04/17/2000

Record Status
Packaging Status: R
Pkg Results:
Pell Eligibility:
Award Methodology:
Record Source: I
External Export: Y
Ready Date: 04/17/2000
Transaction Processed Date: 07/14/2000
Application Received Date: [illegible]
Date Record Packaged:
Dependency Status: I

Needs Analysis
Budget: $ [illegible]
Budget Code: 5_
- EFC: $ 5406
Low Tuition:
= Unmet Need: $ [illegible]
- Awarded Funds: $ 0
- Unsub/PLUS/NNB: $ 0
= Remaining Need: [illegible]
☐ Auto Zero EFC
☐ Simplified Needs
☐ Borrower Based
☐ Prior Degree?
Parent Contribution: $ 0
Overaward Indicator: N
Total Income: $ 0
PELL EFC: $ 5406
Estimated PELL Award: $ 0

Demo FAFSA SAR/ISIR Ver Wks ISIR Rvw Docs Notes User Data Loans Awards Pell Grant
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

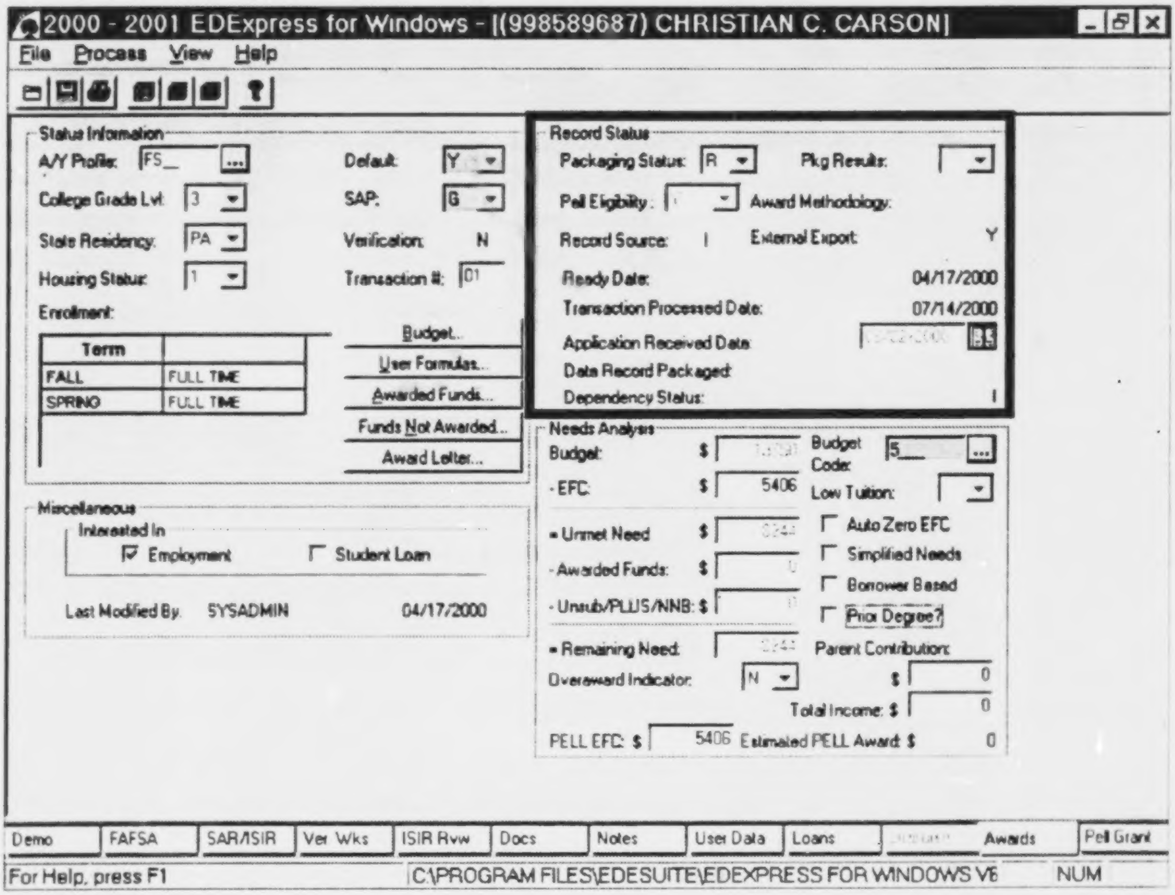
- **Pkg Results** indicates action taken by the student or the financial aid administrator regarding the award packaged. After the packaging process runs, the field value defaults to the value indicated in the Packaging System Setup.

  A = Accepted
  O = Offered
  D = Declined
  S = Suspend

- **Pell Eligibility** displays the student's Pell Eligibility status as defined by the CPS and imported with the ISIR. Valid values are Y (Pell Eligible) and N (Not Pell Eligible). You can manually update this field only when the Record Source status is E or M.

- **Record Source** field displays how the record was originated.

  E = External Import
  I = ISIR Originated
  M = Manually Originated



2000 - 2001 EDExpress for Windows - [(998589687) CHRISTIAN C. CARSON]

Status Information
A/Y Profile: FS_
Default: Y
College Grade Lvl: 3
SAP: G
State Residency: PA
Verification: N
Housing Status: 1
Transaction #: 01
Enrollment:

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous
Interested In
☑ Employment ☐ Student Loan
Last Modified By: SYSADMIN 04/17/2000

Record Status
Packaging Status: R
Pkg Results:
Pell Eligibility:
Award Methodology:
Record Source: I
External Export: Y
Ready Date: 04/17/2000
Transaction Processed Date: 07/14/2000
Application Received Date: [illegible]
Date Record Packaged:
Dependency Status: I

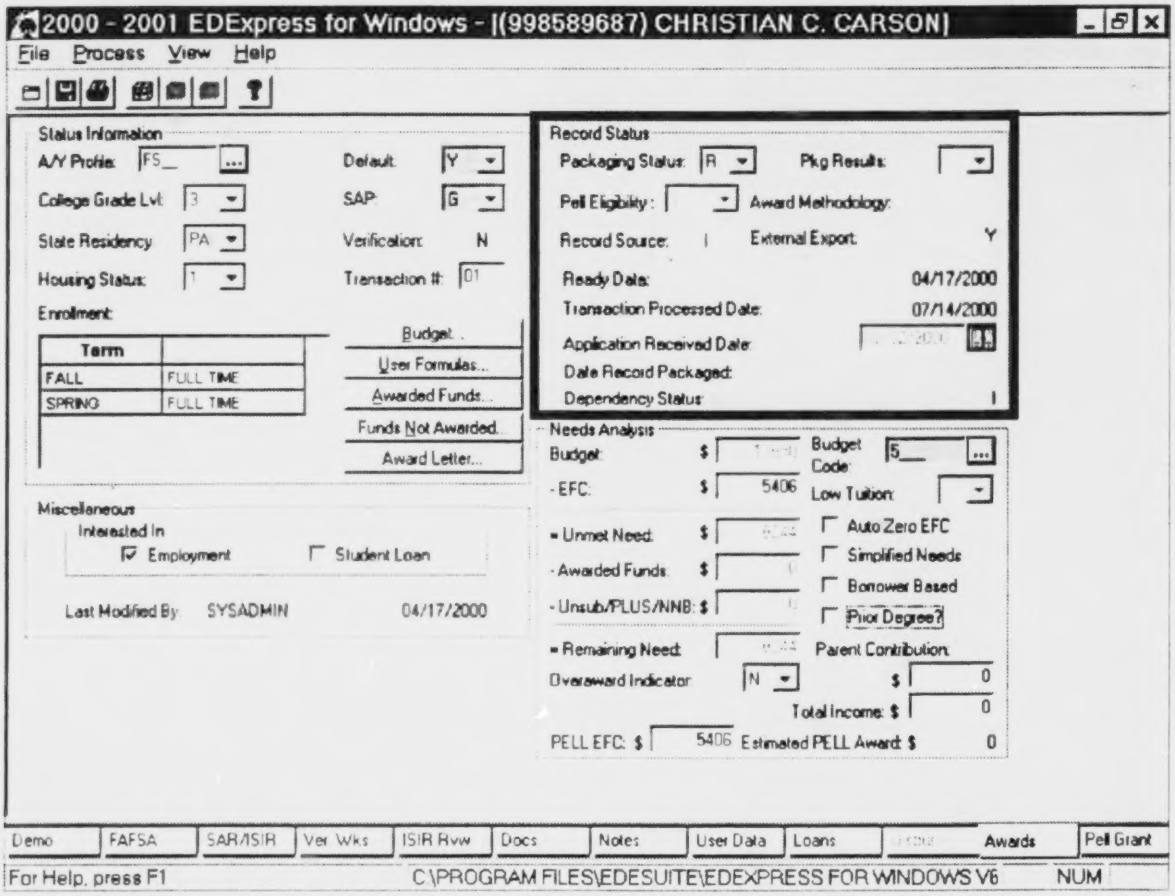
Needs Analysis
Budget: $ [illegible]
Budget Code: 5___
- EFC: $ 5406
Low Tuition:
= Unmet Need $ [illegible]
- Awarded Funds: $ 0
- Unsub/PLUS/NNB: $ 0
= Remaining Need: [illegible]
☐ Auto Zero EFC
☐ Simplified Needs
☐ Borrower Based
☐ Prior Degree?
Overaward Indicator: N
Parent Contribution: $ 0
Total Income: $ 0
PELL EFC: $ 5406
Estimated PELL Award: $ 0

For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

BEST COPY AVAILABLE

- **Award Methodology** displays the award methodology code automatically assigned by the system and used to package the student
- **External Export** indicates if this record was exported to an external file. Valid codes are Y (yes) and N (no)
- **Ready Date** displays the date that the student's packaging status changed to R
- **Transaction Processed Date** displays the date that the FAFSA transaction was processed by CPS
- **Application Received Date** displays the date that the FASFA was received by CPS for processing (or the Transaction Receipt Date on the ISIR)
- **Date Record Packaged** displays the most recent date the record was packaged
- **Dependency Status** defaults to the value from the student's demographic record

[Slide 3-15]


File
Process
View
Help
Budget...
User Formulas...
Awarded Funds...
Funds Not Awarded...
Award Letter...
Demo
FAFSA
SAR/ISIR
Ver. Wks
ISIR Rvw
Docs
Notes
User Data
Loans
Awards
Pell Grant
For Help, press F1
NUM

2000 - 2001 EDExpress for Windows - [(998589687) CHRISTIAN C. CARSON]

Status Information
A/Y Profile: FS_
College Grade Lvl: 3
State Residency: PA
Housing Status: 1
Default: Y
SAP: G
Verification: N
Transaction #: 01

Enrollment

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous
Interested In
☑ Employment ☐ Student Loan
Last Modified By: SYSADMIN 04/17/2000

Record Status
Packaging Status: R
Pkg Results:
Pell Eligibility:
Award Methodology:
Record Source: I
External Export: Y
Ready Date: 04/17/2000
Transaction Processed Date: 07/14/2000
Application Received Date:
Date Record Packaged:
Dependency Status: I

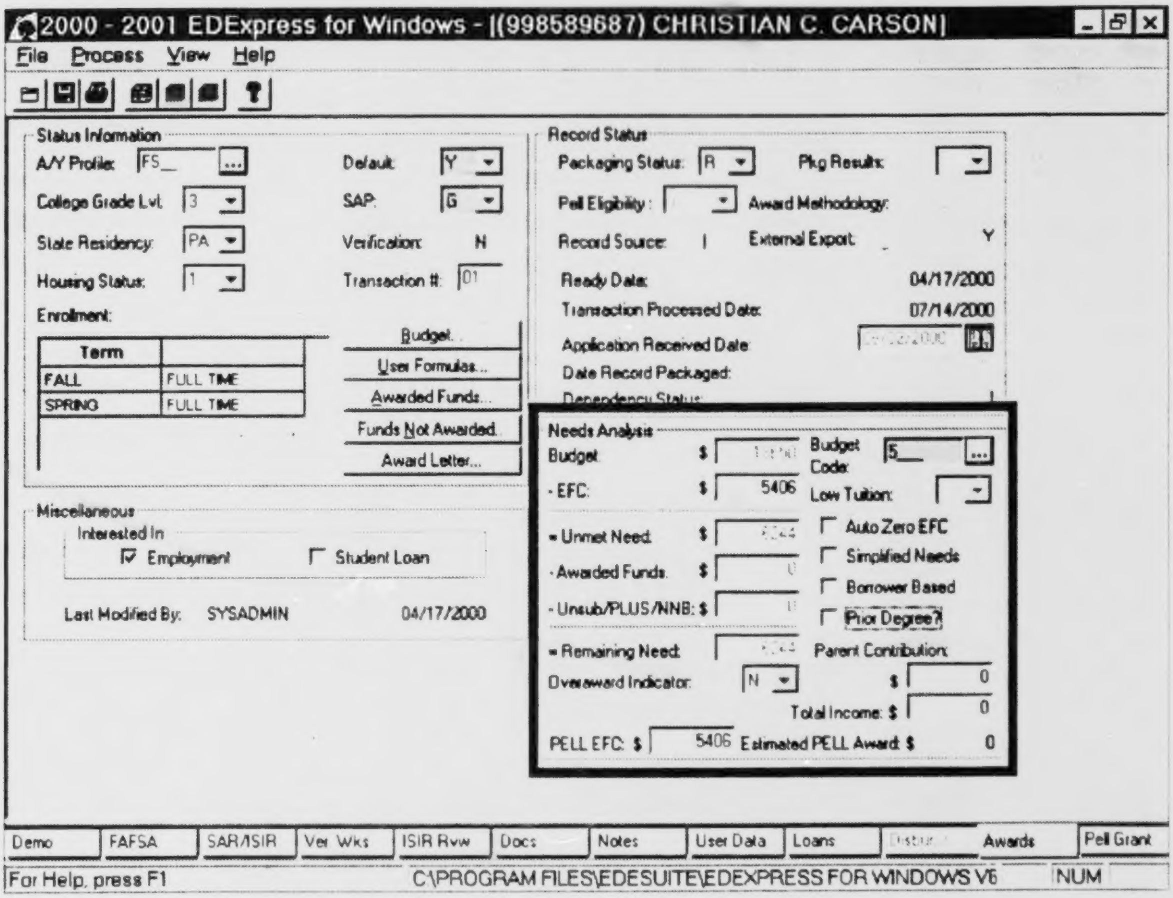
Needs Analysis
Budget: $
Budget Code: 5_
- EFC: $ 5406
Low Tuition:
= Unmet Need: $
- Awarded Funds: $
- Unsub/PLUS/NNB: $
= Remaining Need:
Overaward Indicator: N
☐ Auto Zero EFC
☐ Simplified Needs
☐ Borrower Based
☐ Prior Degree?
Parent Contribution: $ 0
Total Income: $ 0
PELL EFC: $ 5406
Estimated PELL Award: $ 0

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6

Needs Analysis

All the fields in this area are used to calculate and identify the student's need. In addition, the Budget Code is a required value to create a packaging record.

- **Budget Code** displays the budget used to package the student.
- **Budget** displays the total of the student's budget based on Budget Setup for that budget code assigned, plus or minus any manual adjustments made to the student's budget.
- **EFC** displays the primary EFC from the student's ISIR. You can modify the value in this field if you selected the Allow imported Pell EFC to be modified option in the Packaging System Setup.
- **Unmet Need** displays the result of subtracting the EFC from the Budget.
- **Awarded Funds** displays the total of all need-based funds awarded.
- **Unsub/PLUS/NNB** displays the total of Unsubsidized Stafford, PLUS, or Non Need-Based loans awarded.
- **Remaining Need** displays the total of the budget, minus the EFC, minus the Awarded Funds, and minus the Unsub/PLUS/NNB.


2000 - 2001 EDExpress for Windows - [(998589687) CHRISTIAN C. CARSON]
File
Process
View
Help
Budget...
User Formulas...
Awarded Funds...
Funds Not Awarded...
Award Letter...
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Loans
Disbur...
Awards
Pell Grant

Status Information
A/Y Profile: FS_
Default: Y
College Grade Lvl: 3
SAP: G
State Residency: PA
Verification: N
Housing Status: 1
Transaction #: 01
Enrollment:

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous
Interested In
☑ Employment
☐ Student Loan
Last Modified By: SYSADMIN 04/17/2000

Record Status
Packaging Status: R
Pkg Results:
Pell Eligibility:
Award Methodology:
Record Source: I
External Export: Y
Ready Date: 04/17/2000
Transaction Processed Date: 07/14/2000
Application Received Date: [illegible]
Date Record Packaged:
Dependency Status: I

Needs Analysis
Budget $ [illegible]
Budget Code: 5_
- EFC: $ 5406
Low Tuition:
= Unmet Need $ [illegible]
☐ Auto Zero EFC
☐ Simplified Needs
☐ Borrower Based
☐ Prior Degree?
- Awarded Funds $ 0
- Unsub/PLUS/NNB: $ 0
= Remaining Need [illegible]
Parent Contribution: $ 0
Overaward Indicator: N
Total Income: $ 0
PELL EFC: $ 5406
Estimated PELL Award: $ 0

For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

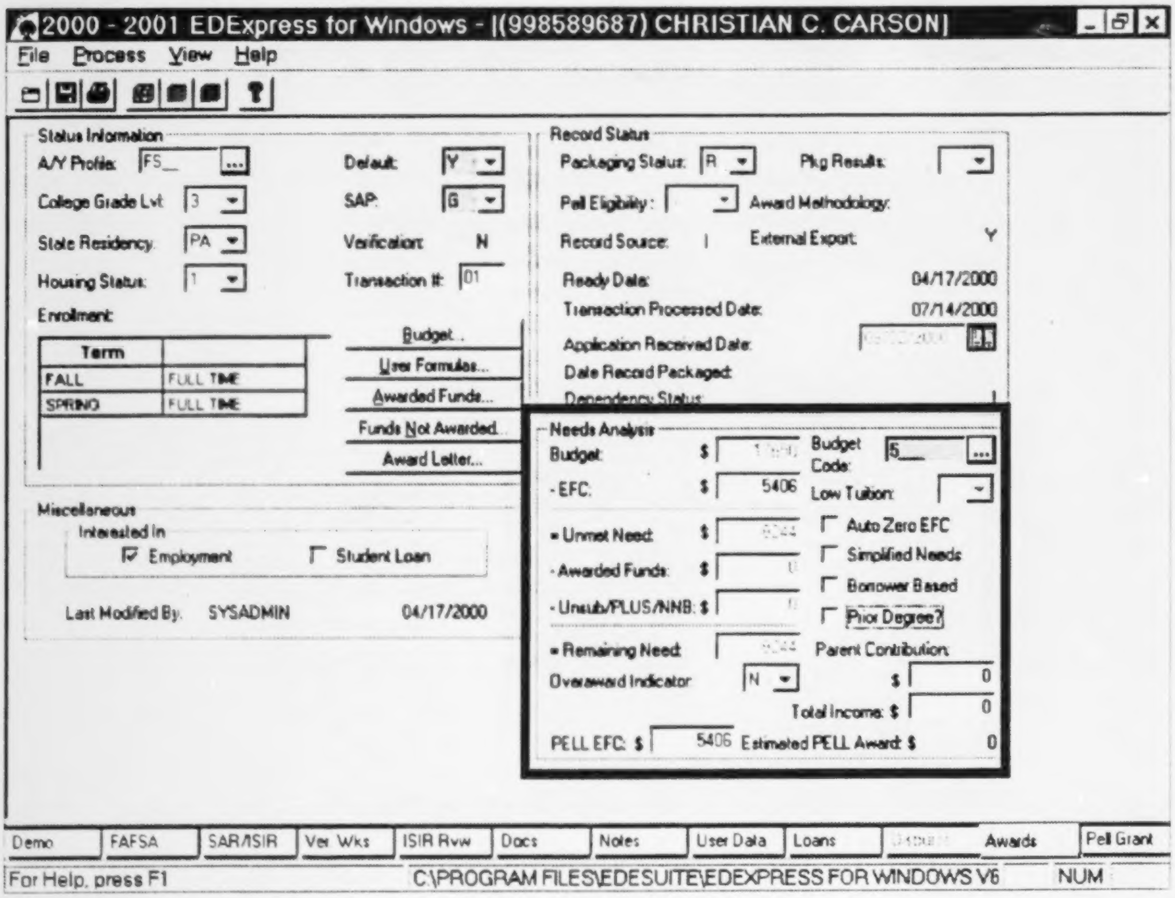
- **Low Tuition** displays values only if you selected this option in Packaging System Setup

NEW!

This option is only for schools that receive approval from the Department of Education to award Pell based on the Alternate Pell Grant Schedules for Students with Low Assessed Tuition. Students matching this category have an EFC of $300 or less, a budget of $3000 or higher, and a combined cost of Tuition/Dependent Child Care/ Disability Expenses of less than $300.

- **Auto Zero EFC** is populated if the record is imported from an ISIR with a 0 EFC based on an automatic zero EFC calculation.
- **Simplified Needs** is populated based on the imported ISIR record.
- **Borrower Based** allows you to use prior term eligibility to package the student, according to the Borrower Based federal rules and regulations.

  If you select this option, the system increases subsidized and unsubsidized loan limits to twice the amount of the annual loan limit for the student college grade level during packaging. The amounts for each disbursement are allocated according to the percentages you defined for the AYP and will not be correct. You must manually adjust the amounts.
- **Prior Degree** is populated based on the imported ISIR record to indicate that the student has a prior undergraduate degree.


2000 - 2001 EDExpress for Windows - |(998589687) CHRISTIAN C. CARSON|

Status Information
A/Y Profile: FS__
College Grade Lvl: 3
State Residency: PA
Housing Status: 1
Default: Y
SAP: G
Verification: N
Transaction #: 01

Enrollment:

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous
Interested In
☑ Employment ☐ Student Loan
Last Modified By: SYSADMIN 04/17/2000

Record Status
Packaging Status: R
Pkg Results:
Pell Eligibility:
Award Methodology:
Record Source: I
External Export: Y
Ready Date: 04/17/2000
Transaction Processed Date: 07/14/2000
Application Received Date:
Date Record Packaged:
Dependency Status: I

Needs Analysis
Budget: $ 11650
- EFC: $ 5406
= Unmet Need: $ 6244
- Awarded Funds: $ 0
- Unsub/PLUS/NNB: $ 0
= Remaining Need: 6244
Overaward Indicator: N
PELL EFC: $ 5406
Budget Code: 5__
Low Tuition:
☐ Auto Zero EFC
☐ Simplified Needs
☐ Borrower Based
☐ Prior Degree?
Parent Contribution: $ 0
Total Income: $ 0
Estimated PELL Award: $ 0

For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

- **Overaward Indicator** shows that a student's remaining need eligibility is less than zero. The values for this field are:

  Y = Overaward exists
  E = Exception
  N = No overaward exists
  R = Resolved

  When set to Y, the system will not package aid. It's important to note that, in this context, the term "overaward" refers to eligibility for need-based aid only. It does not mean the student received an overaward of federal aid.

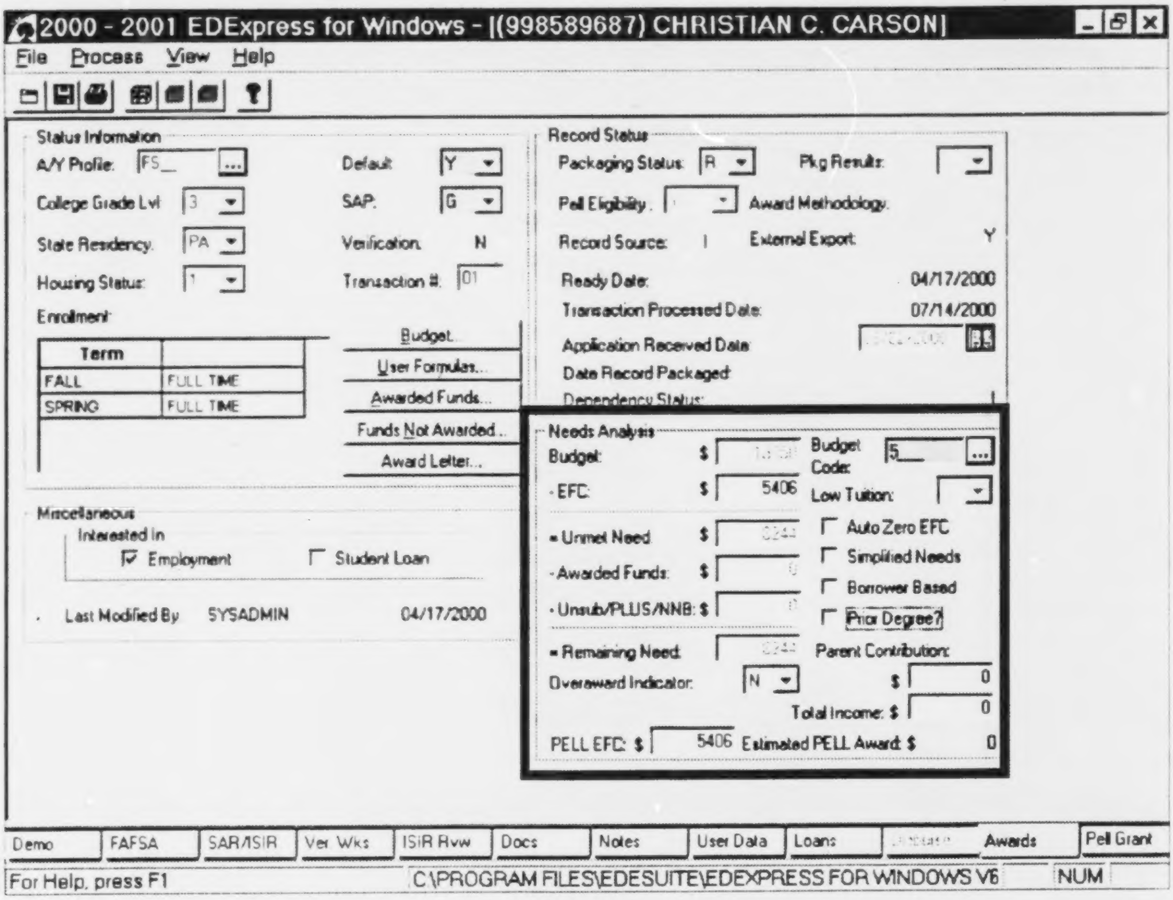
- **Parent Contribution** displays the total parent contribution used in the EFC calculation from the imported ISIR record.

- **Total Income** displays the total income from the ISIR for the independent student, and the sum of the student's total income and the parent's total income for the dependent student.

- **Pell EFC** displays the 9-month EFC taken from the imported ISIR record and used to calculate the Estimated Pell Award. You can modify the value in this field if you selected the Allow Imported Pell EFC to Be Modified option in the Packaging System Setup.

- **Estimated Pell Award** displays the Pell Award derived from the appropriate Pell payment chart based on the Pell EFC. The record does not need to be packaged in order for this value to be displayed.

[Slide 3-16]



2000 - 2001 EDExpress for Windows - [(998589687) CHRISTIAN C. CARSON]

Status Information
A/Y Profile: FS_
Default: Y
College Grade Lvl: 3
SAP: G
State Residency: PA
Verification: N
Housing Status: 1
Transaction #: 01

Enrollment:

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous
Interested in
☑ Employment
☐ Student Loan

Last Modified By SYSADMIN 04/17/2000

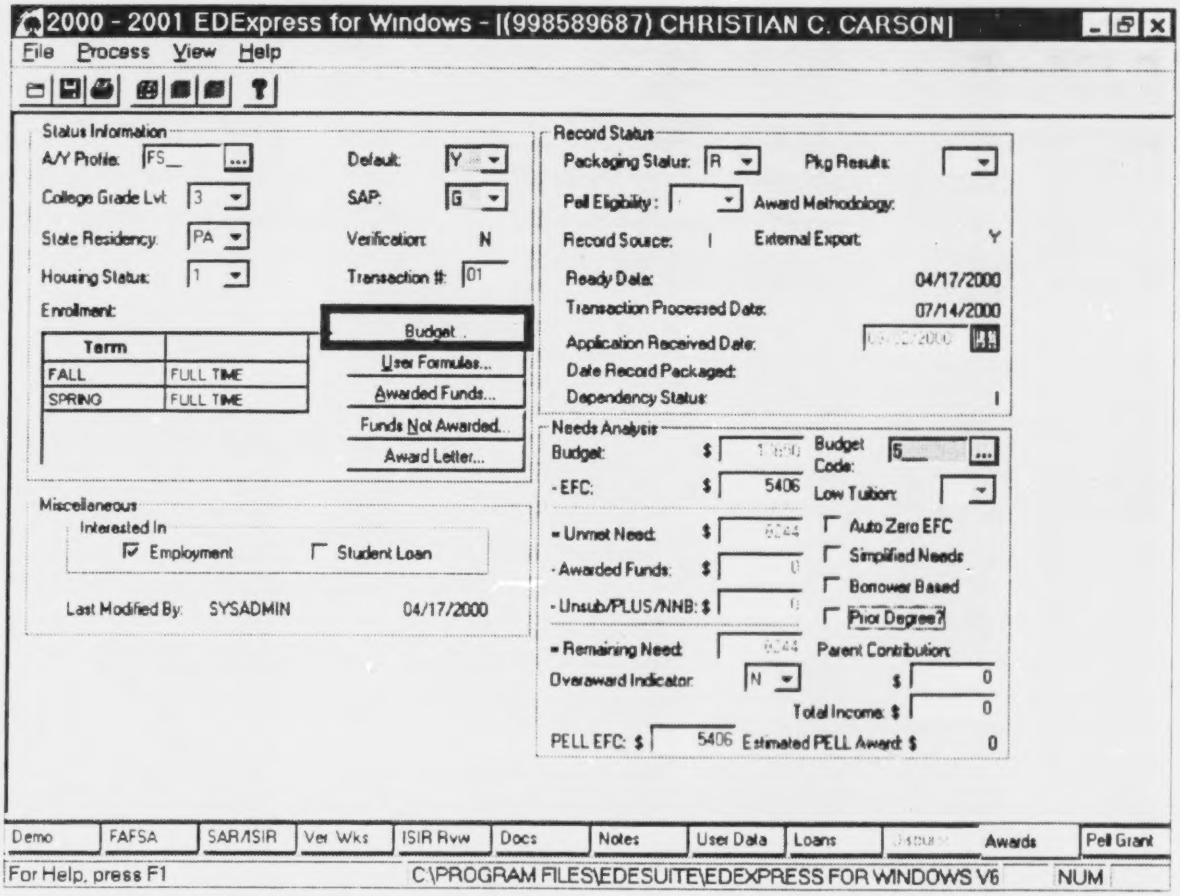
Record Status
Packaging Status: R
Pkg Results:
Pell Eligibility:
Award Methodology:
Record Source: I
External Export: Y
Ready Date: 04/17/2000
Transaction Processed Date: 07/14/2000
Application Received Date:
Date Record Packaged:
Dependency Status:

Needs Analysis
Budget: $
Budget Code: 5_
- EFC: $ 5406
Low Tuition:
= Unmet Need $
☐ Auto Zero EFC
☐ Simplified Needs
☐ Borrower Based
☐ Prior Degree?
- Awarded Funds: $
- Unsub/PLUS/NNB: $
= Remaining Need
Overaward Indicator: N
Parent Contribution: $ 0
Total Income: $ 0
PELL EFC: $ 5406
Estimated PELL Award: $ 0

For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

Let's look at a few of the fields more closely.

Click the ***Budget...*** *button to view the details of the budget assigned to the student according to the student's Budget Code.*



2000 - 2001 EDExpress for Windows - [(998589687) CHRISTIAN C. CARSON]

File
Process
View
Help

Status Information
A/Y Profile: FS_
Default: Y
College Grade Lvl: 3
SAP: G
State Residency: PA
Verification: N
Housing Status: 1
Transaction #: 01
Enrollment:

Term	
FALL	FULL TIME
SPRING	FULL TIME

Budget...
User Formulas...
Awarded Funds...
Funds Not Awarded...
Award Letter...

Miscellaneous
Interested In
☑ Employment
☐ Student Loan
Last Modified By: SYSADMIN 04/17/2000

Record Status
Packaging Status: R
Pkg Results:
Pell Eligibility:
Award Methodology:
Record Source: I
External Export: Y
Ready Date: 04/17/2000
Transaction Processed Date: 07/14/2000
Application Received Date: [illegible]
Date Record Packaged:
Dependency Status: I

Needs Analysis
Budget: $ 11650
Budget Code: 5
- EFC: $ 5406
Low Tuition:
= Unmet Need: $ 6244
☐ Auto Zero EFC
- Awarded Funds: $ 0
☐ Simplified Needs
- Unsub/PLUS/NNB: $ 0
☐ Borrower Based
☐ Prior Degree?
= Remaining Need: 6244
Parent Contribution: $ 0
Overaward Indicator: N
Total Income: $ 0
PELL EFC: $ 5406
Estimated PELL Award: $ 0

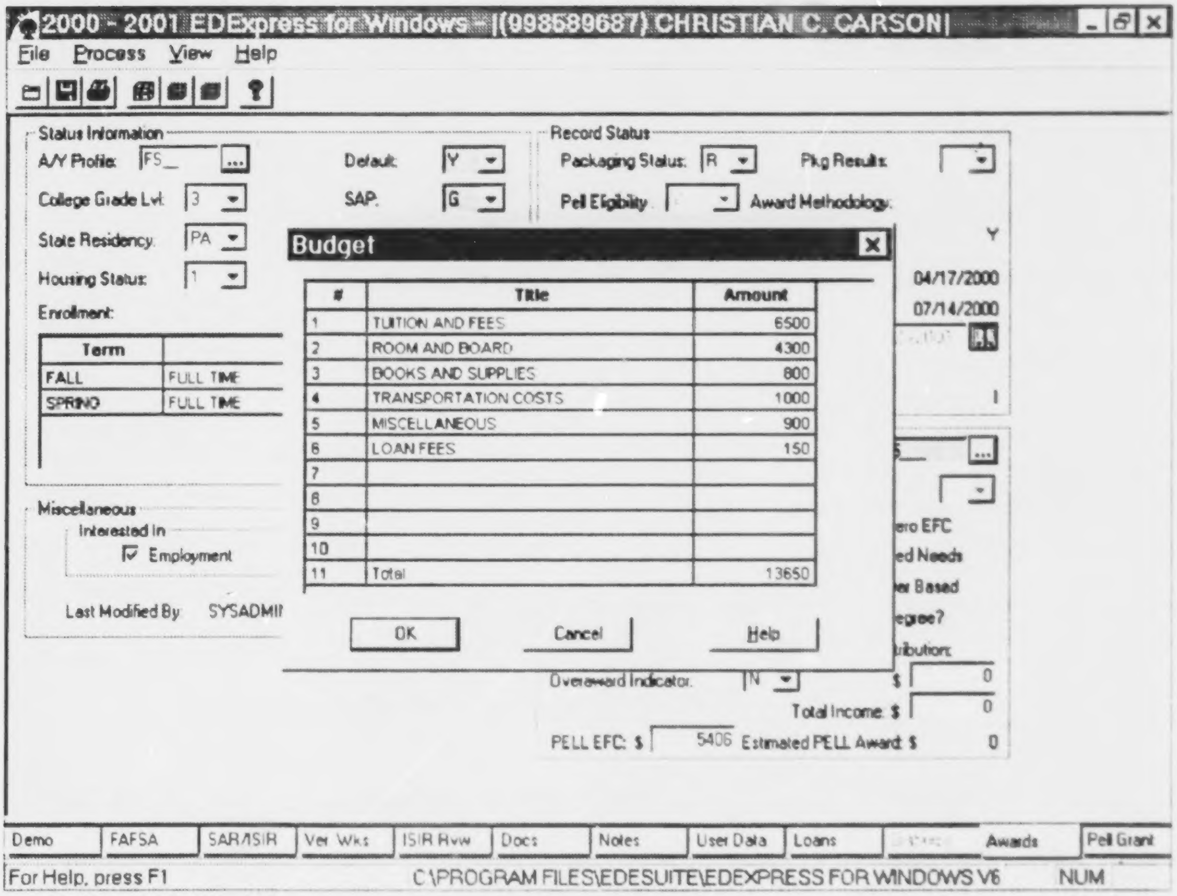
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Loans
Disburse
Awards
Pell Grant

For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

You can make changes to a student's budget as needed. Note that you can delete User-defined Budget Components, but you can only zero out system-defined Budget Components.

For example, if the student won't accept loans, we need to remove the Loan Fee, a User-defined Budget Component.

The Budget dialog box displays the components and amounts of the budget assigned to this student.



2000 - 2001 EDExpress for Windows - |(998689687) CHRISTIAN C. CARSON|

Status Information

A/Y Profile: FS_

College Grade Lvl: 3

State Residency: PA

Housing Status: 1

Default: Y

SAP: G

Enrollment:

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous

Interested In

☑ Employment

Last Modified By: SYSADMI

Record Status

Packaging Status: R

Pkg Results:

Pell Eligibility:

Award Methodology:

Y

04/17/2000

07/14/2000

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egree?

ibution:

Overaward Indicator: N

$ 0

Total Income: $ 0

PELL EFC: $ 5406

Estimated PELL Award: $ 0

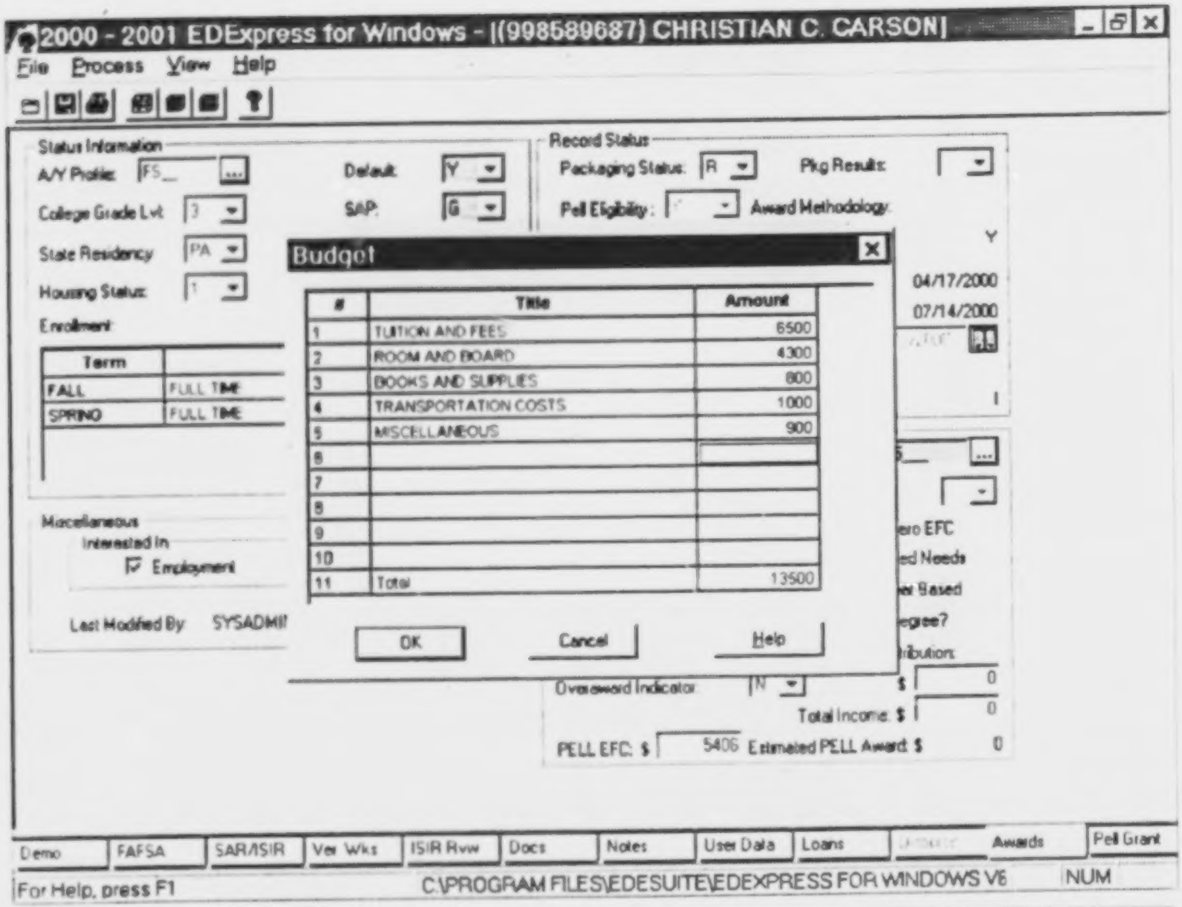
#	Title	Amount
1	TUITION AND FEES	6500
2	ROOM AND BOARD	4300
3	BOOKS AND SUPPLIES	800
4	TRANSPORTATION COSTS	1000
5	MISCELLANEOUS	900
6	LOAN FEES	150
7		
8		
9		
10		
11	Total	13650

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6 NUM

*Click the **Loan Fee** field, and press the **Delete** key to remove the loan fees from the student's budget.*

*Click **OK** to close the Budget dialog box.*

*To save the change to the budget, click the **Save** icon, then **OK**.*


2000 - 2001 EDExpress for Windows - [(998589687) CHRISTIAN C. CARSON]
File
Process
View
Help
Status Information
Record Status
Enrollment
Miscellaneous
Interested In
Budget
OK
Cancel
Help
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Loans
Awards
Pell Grant
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

A/Y Profile: FS_
Default: Y
College Grade Lvl: 3
SAP: G
State Residency: PA
Housing Status: 1

Term	
FALL	FULL TIME
SPRING	FULL TIME

☑ Employment

Last Modified By: SYSADMI

Packaging Status: R
Pkg Results:
Pell Eligibility:
Award Methodology:

Y

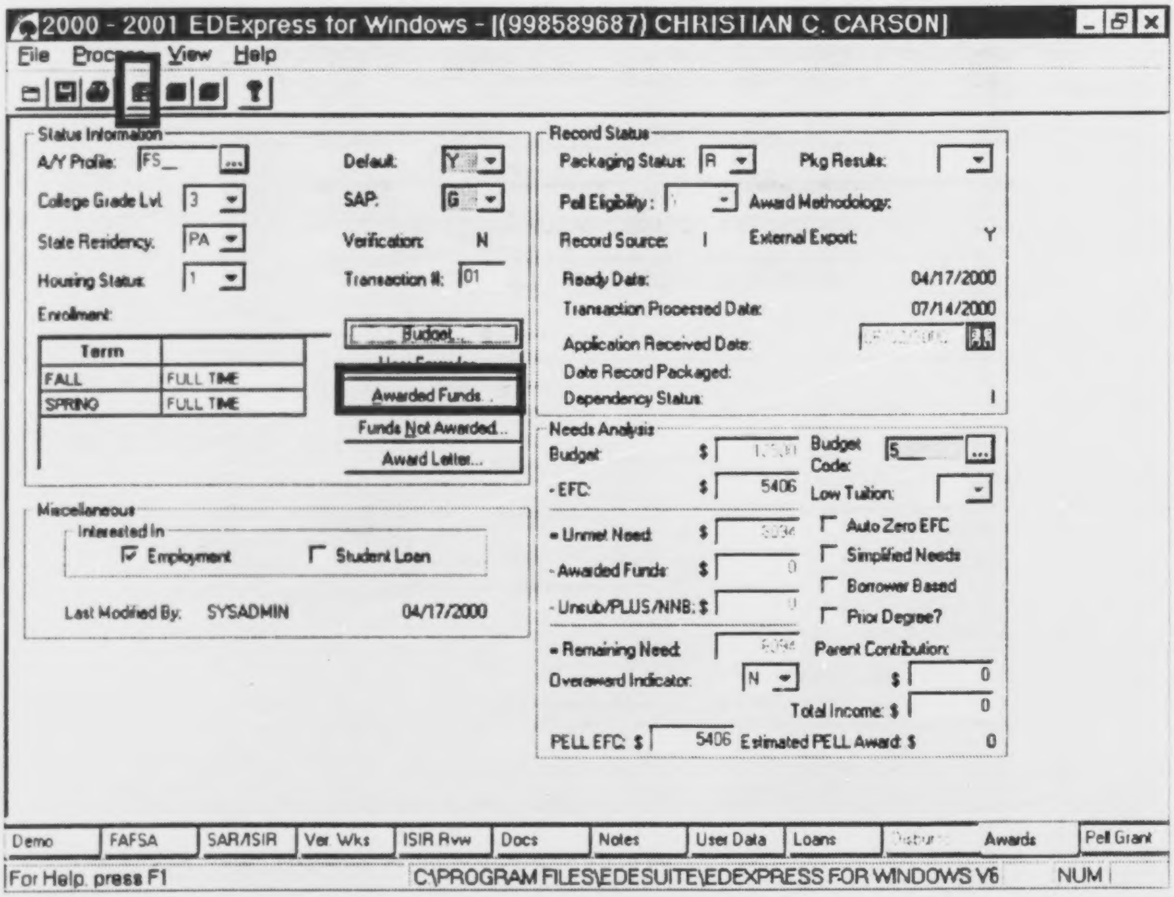
04/17/2000

07/14/2000

Overaward Indicator: N
$ 0
Total Income: $ 0
PELL EFC: $ 5406
Estimated PELL Award: $ 0

#	Title	Amount
1	TUITION AND FEES	6500
2	ROOM AND BOARD	4300
3	BOOKS AND SUPPLIES	800
4	TRANSPORTATION COSTS	1000
5	MISCELLANEOUS	900
6		
7		
8		
9		
10		
11	Total	13500

When the Package icon is displayed, the Awarded Funds button is not grayed out


File
Process
View
Help
Budget...
User Formulas...
Awarded Funds...
Funds Not Awarded...
Award Letter...
Demo
FAFSA
SAR/ISIR
Ver. Wks
ISIR Rvw
Docs
Notes
User Data
Loans
Disburse
Awards
Pell Grant
For Help, press F1
NUM

2000 - 2001 EDExpress for Windows - [(998589687) CHRISTIAN C. CARSON]

Status Information

A/Y Profile: FS
College Grade Lvl: 3
State Residency: PA
Housing Status: 1
Default: Y
SAP: G
Verification: N
Transaction #: 01

Enrollment:

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous

Interested In
☑ Employment ☐ Student Loan

Last Modified By: SYSADMIN 04/17/2000

Record Status

Packaging Status: R
Pkg Results:
Pell Eligibility:
Award Methodology:
Record Source: I
External Export: Y
Ready Date: 04/17/2000
Transaction Processed Date: 07/14/2000
Application Received Date:
Date Record Packaged:
Dependency Status: I

Needs Analysis

Budget $
Budget Code: 5
- EFC: $ 5406
Low Tuition:
= Unmet Need $
- Awarded Funds $ 0
- Unsub/PLUS/NNB: $ 0
= Remaining Need
Overaward Indicator: N
☐ Auto Zero EFC
☐ Simplified Needs
☐ Borrower Based
☐ Prior Degree?
Parent Contribution: $ 0
Total Income: $ 0
PELL EFC: $ 5406
Estimated PELL Award: $ 0

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6

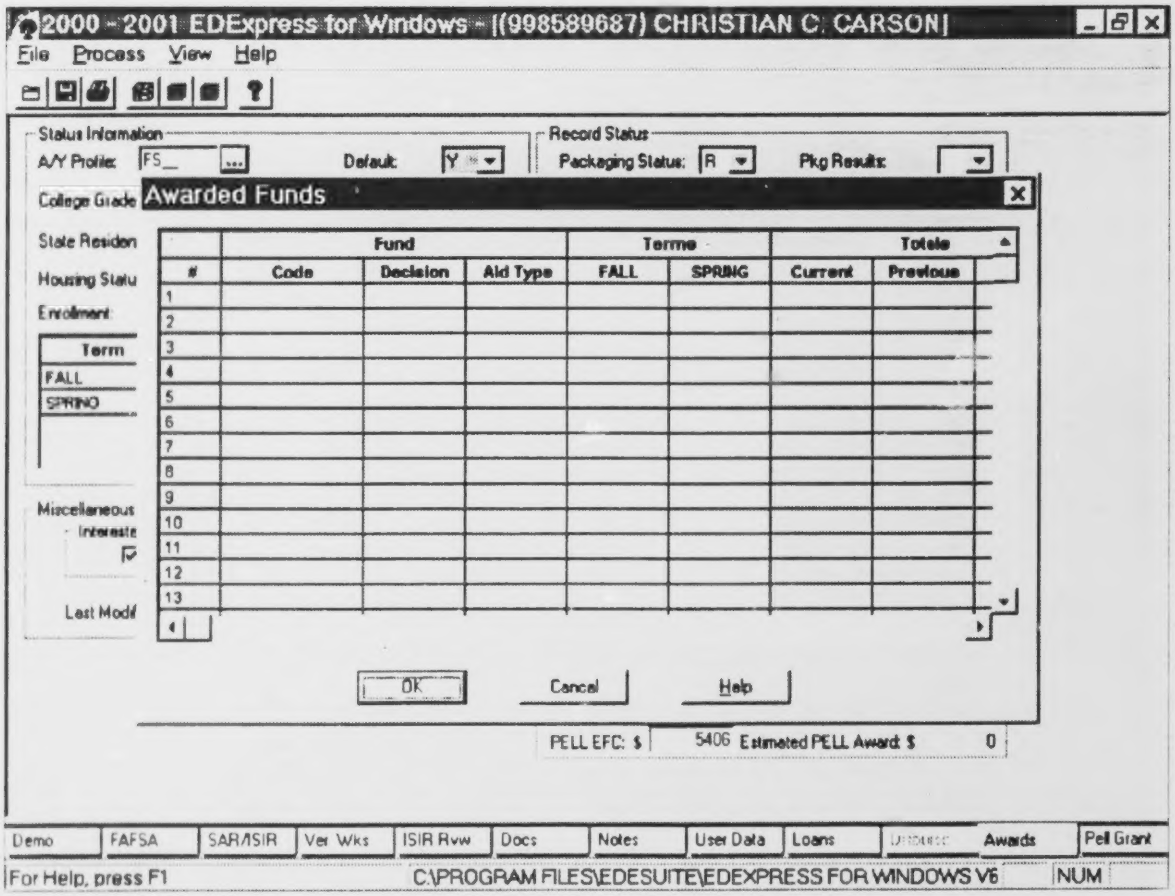
*Click the **Awarded Funds** button*

The Awarded Funds dialog box displays

*Click **OK** to close the Awarded Funds dialog box*

Although this student has not been packaged and no awards exist, let's look at the information that would be displayed for each fund awarded

- **Fund Code**
- **Decision** default value (i.e., Accepted, Offered, Declined, or Suspended; these can be modified),
- **Aid Type** (i.e., F, E, G, W) assigned to the fund
- **Amount** awarded per term
- **Totals** awarded from each fund, both current and previous


2000 - 2001 EDExpress for Windows - [(998589687) CHRISTIAN C. CARSON]
File
Process
View
Help
Status Information
Record Status
Pkg Results:
College Grade
State Residen
Housing Statu
Enrollment
Term
FALL
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Miscellaneous
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Last Modif
OK
Cancel
Help
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Loans
Awards
Pell Grant
NUM

A/Y Profile: FS__

Default: Y

Packaging Status: R

Awarded Funds

	Fund			Terms		Totals	
#	Code	Decision	Aid Type	FALL	SPRING	Current	Previous
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							

PELL EFC: $ 5406 Estimated PELL Award: $ 0

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6

Apply What You Learned

Complete the following exercise to reinforce what you learned about working with Packaging records

1 Name the three fields that must contain valid data in order for the student's record to be ready for packaging

________________________, ________________________, ________________________

2 If the Default status on the Packaging record is set to Y, the system will not be able to package ________________________ aid (type) for the student

3 If a student has been packaged, you can view the detail of the aid awarded by clicking the ________________________ button

4 The field that indicates how the record was created is the ________________________

5 A value of Y in the Overaward Indicator field indicates that the student's awards exceeds the student's ________________________

6 A Packaging Status of _______ indicates that the record is ready to be packaged

7 A Packaging Status of _______ indicates that the record has been packaged by hand

8 A Packaging Status of N indicates that the record ________________________

9 The Enrollment level in each term impacts only the student's ________________ award

10 The value in the __________________ field describes the student's academic progress

Creating Packaging Data by Manual Entry

To create a new packaging record by manual entry

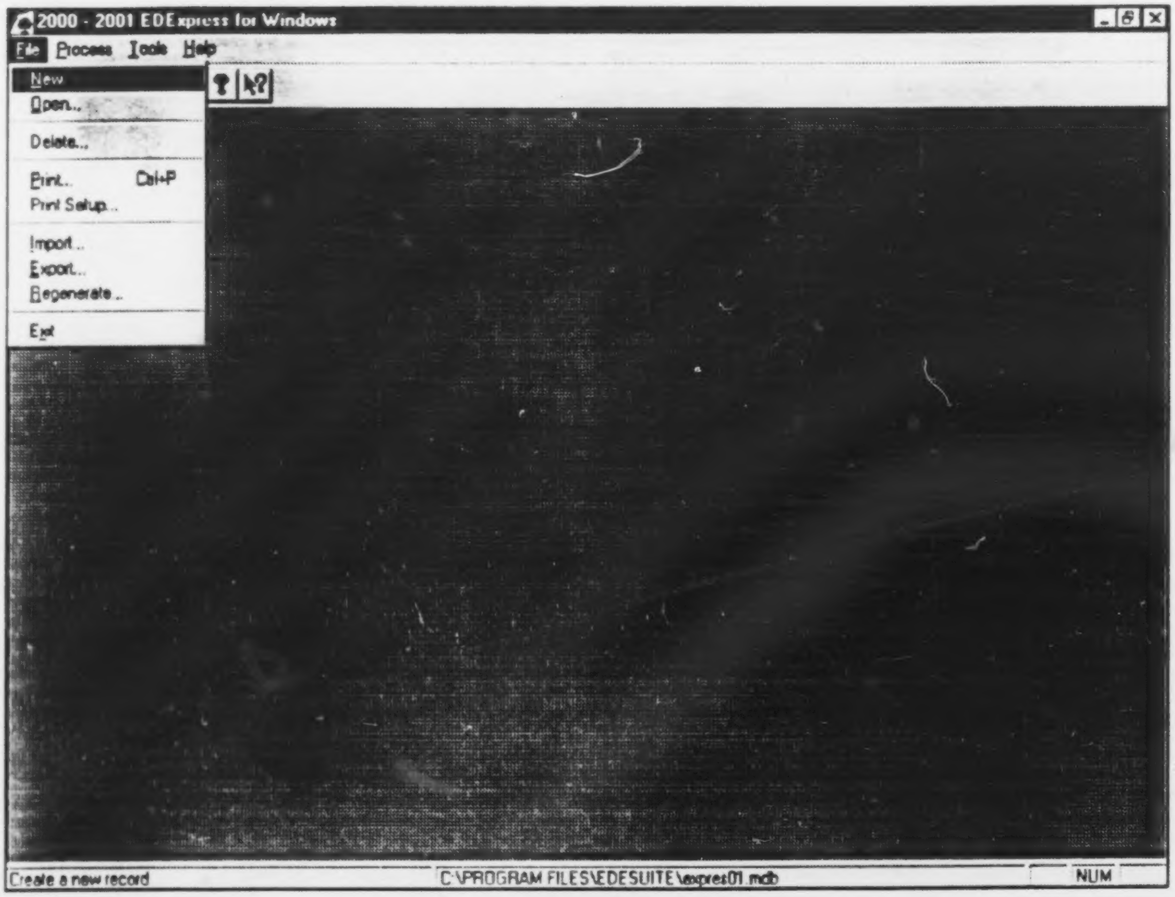
Select ***File/New***

As mentioned, you occasionally may need to create a packaging record for a single student who won't be filing a FASFA. In this case, manual entry is probably the quickest method to create a single record or a small group of records.

Just as with an ISIR import or external add import, your first step is to create a demographic record in the Apps Module. Then, you move to the Awards tab to update the fields required for the Packaging record:

- Academic Year Profile
- College Grade Level
- Budget Code

[Slide 3-18]

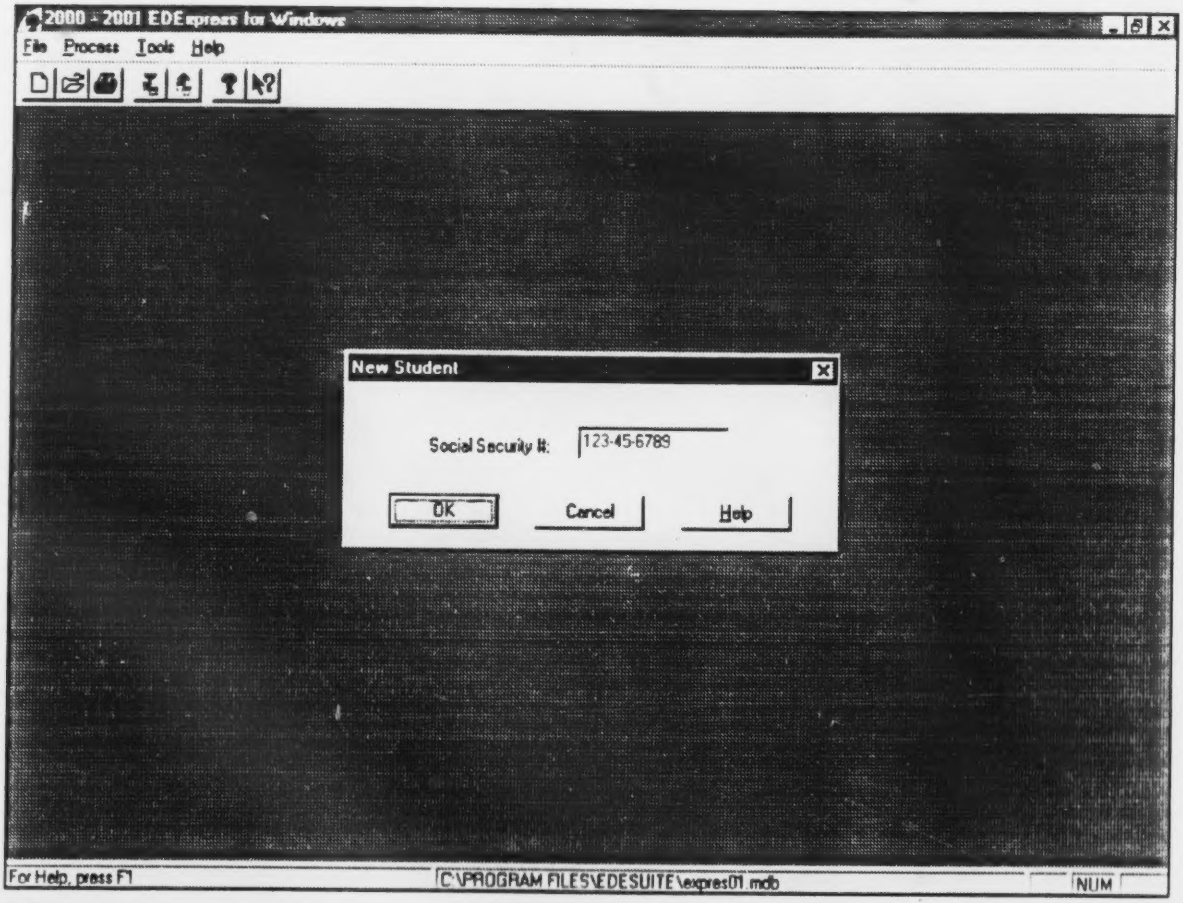

2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
New
Open...
Delete...
Print...
Ctrl+P
Print Setup...
Import...
Export...
Regenerate...
Exit
Create a new record
C:\PROGRAM FILES\EDESUITE\expres01.mdb
NUM

Remember: *For those students not having Social Security Numbers, you will have to devise a system to assign "dummy" SSNs*

The New Student dialog box displays

Enter the student's Social Security Number

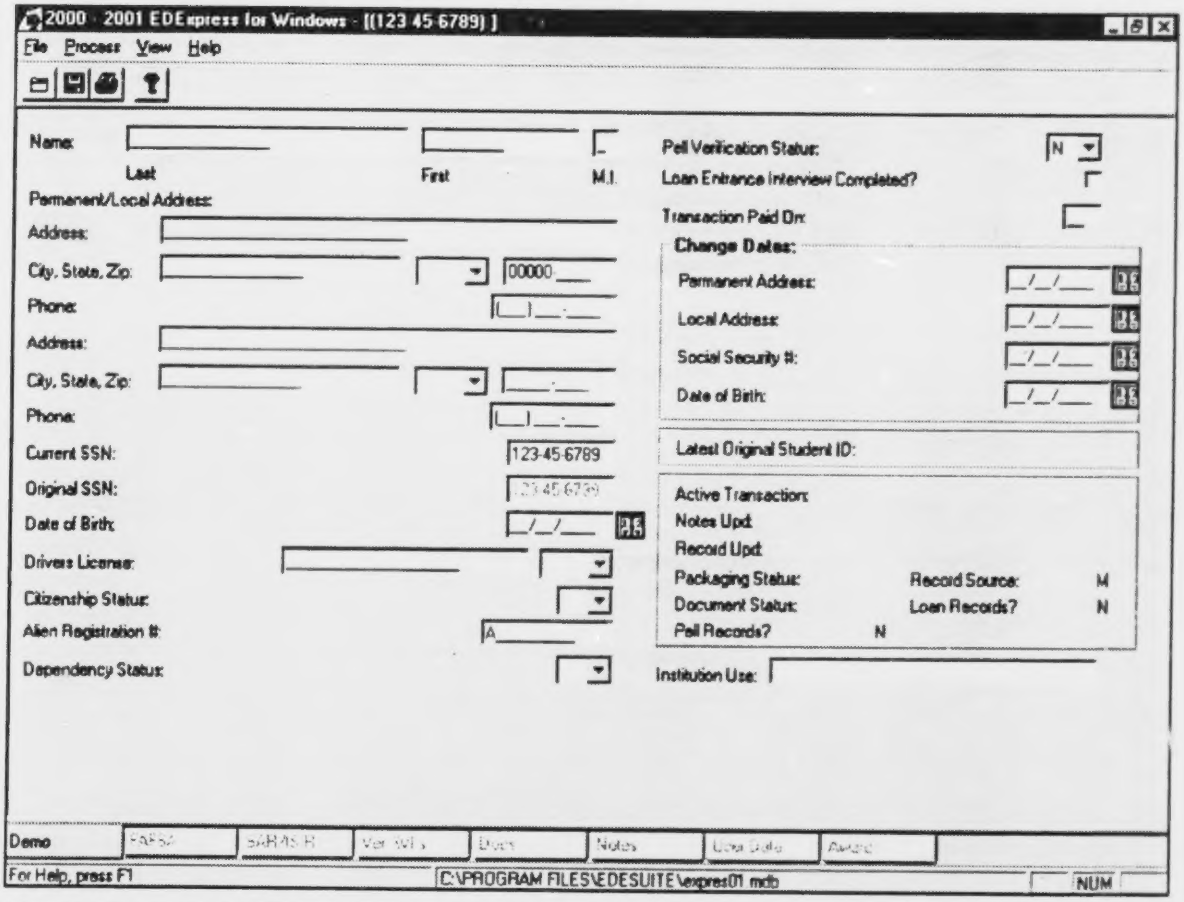
*Click **OK***


2000 - 2001 EDExpress for Windows
File Process Tools Help
New Student
OK
Cancel
Help
For Help, press F1
NUM

Social Security #: 123-45-6789

C:\PROGRAM FILES\EDESUITE\expres01.mdb

A blank demographic screen displays.



2000 - 2001 EDExpress for Windows - [(123 45 6789)]

Current SSN: 123-45-6789

Original SSN: 123-45-6789

Pell Verification Status: N

Record Source: M

Loan Records? N

Pell Records? N

For Help, press F1

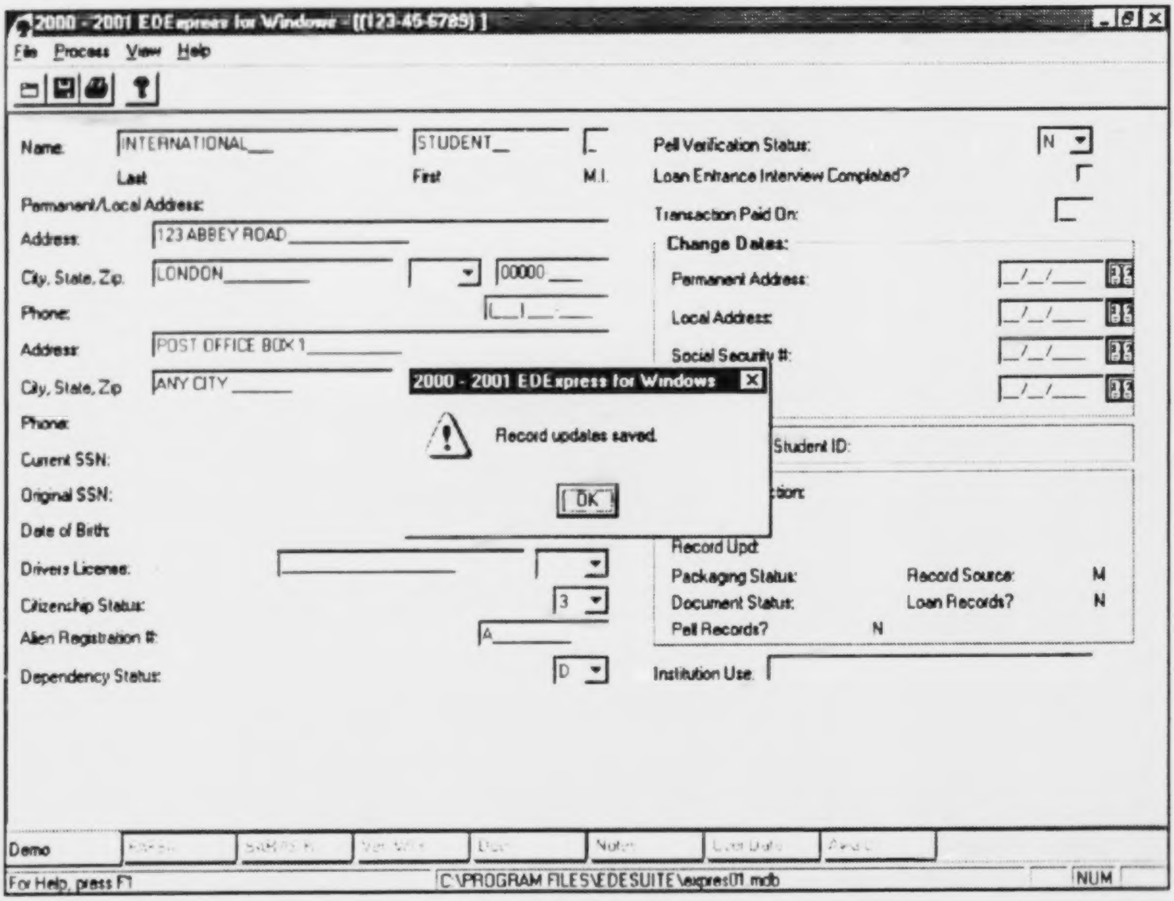
C:\PROGRAM FILES\EDESUITE\expres01.mdb

File
Process
View
Help
Name:
Last
First
M.I.
Permanent/Local Address:
Address:
City, State, Zip:
00000
Phone:
Address:
City, State, Zip:
Phone:
Date of Birth:
Drivers License:
Citizenship Status:
Alien Registration #:
A
Dependency Status:
Loan Entrance Interview Completed?
Transaction Paid On:
Change Dates:
Permanent Address:
Local Address:
Social Security #:
Date of Birth:
Latest Original Student ID:
Active Transaction:
Notes Upd:
Record Upd:
Packaging Status:
Document Status:
Institution Use:
Demo
FAFSA
SAR/ISIR
Ver. WFs
Docs
Notes
Loan Data
Award
NUM

Enter in the various fields as much information as you have on the student.

Click the ***Save*** *icon*

Then click ***OK***



2000 - 2001 EDExpress for Windows - [(123-45-6789)]

Name: INTERNATIONAL (Last) STUDENT (First) M.I.

Permanent/Local Address:

Address: 123 ABBEY ROAD

City, State, Zip: LONDON 00000

Phone:

Address: POST OFFICE BOX 1

City, State, Zip: ANY CITY

Phone:

Current SSN:

Original SSN:

Date of Birth:

Drivers License:

Citizenship Status: 3

Alien Registration #: A

Dependency Status: D

Pell Verification Status: N

Loan Entrance Interview Completed?

Transaction Paid On:

Change Dates:

Permanent Address: _/_/__

Local Address: _/_/__

Social Security #: _/_/__

Student ID:

Record Upd:

Packaging Status:

Record Source: M

Document Status:

Loan Records? N

Pell Records? N

Institution Use:

2000 - 2001 EDExpress for Windows

Record updates saved.

For Help, press F1

C:\PROGRAM FILES\EDESUITE\expres01.mdb

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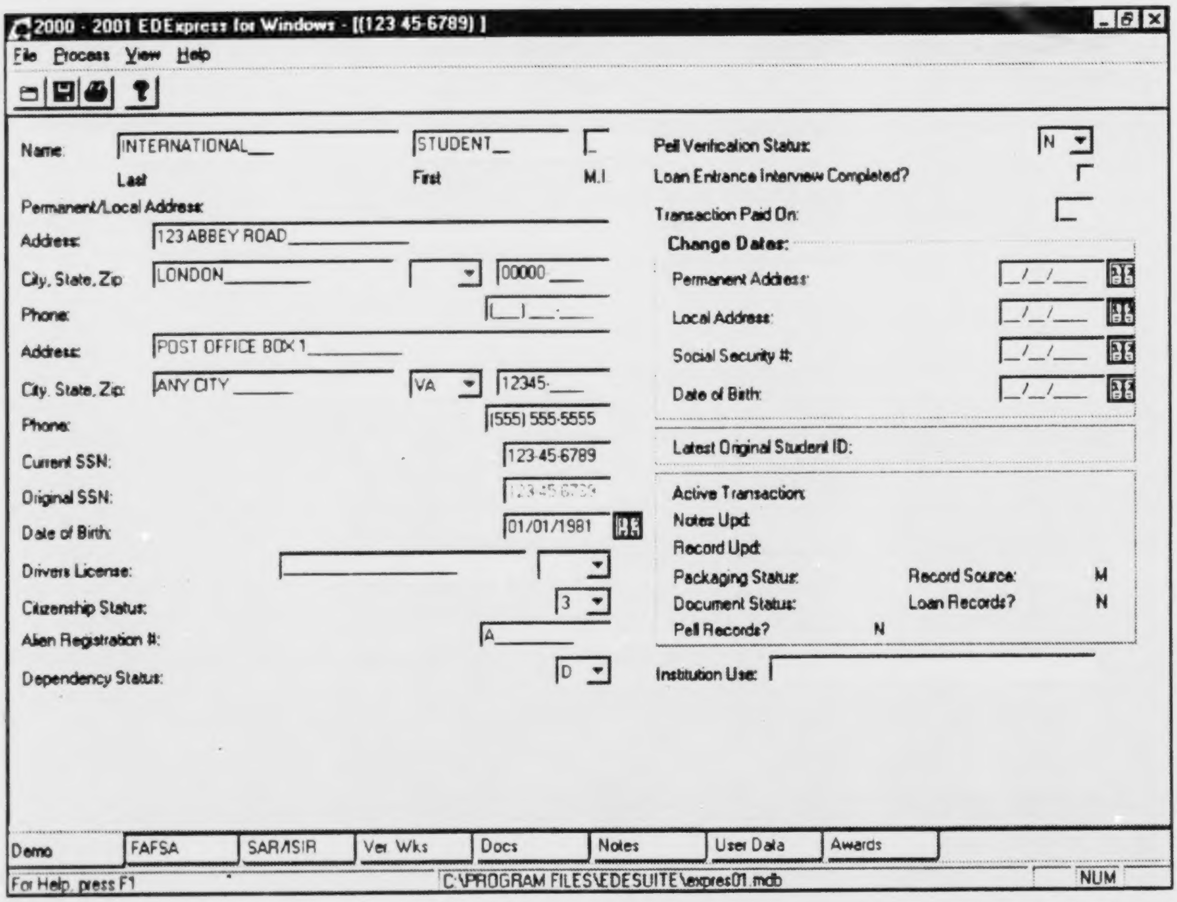
To enter the fields required for the packaging record

*Click the **Awards** tab*


2000 - 2001 EDExpress for Windows - [(123-45-6789)]
File
Process
View
Help
Last
First
M.I.
Permanent/Local Address:
Change Dates:
Demo
FAFSA
SAR/ISIR
Ver. Wks
Docs
Notes
User Data
Awards
NUM

Name: INTERNATIONAL STUDENT

Address: 123 ABBEY ROAD
City, State, Zip: LONDON 00000-
Phone: ( ) -
Address: POST OFFICE BOX 1
City, State, Zip: ANY CITY VA 12345-
Phone: (555) 555-5555
Current SSN: 123-45-6789
Original SSN: 123-45-6789
Date of Birth: 01/01/1981
Drivers License:
Citizenship Status: 3
Alien Registration #: A
Dependency Status: D

Pell Verification Status: N
Loan Entrance Interview Completed?
Transaction Paid On:

Permanent Address: __/__/____
Local Address: __/__/____
Social Security #: __/__/____
Date of Birth: __/__/____

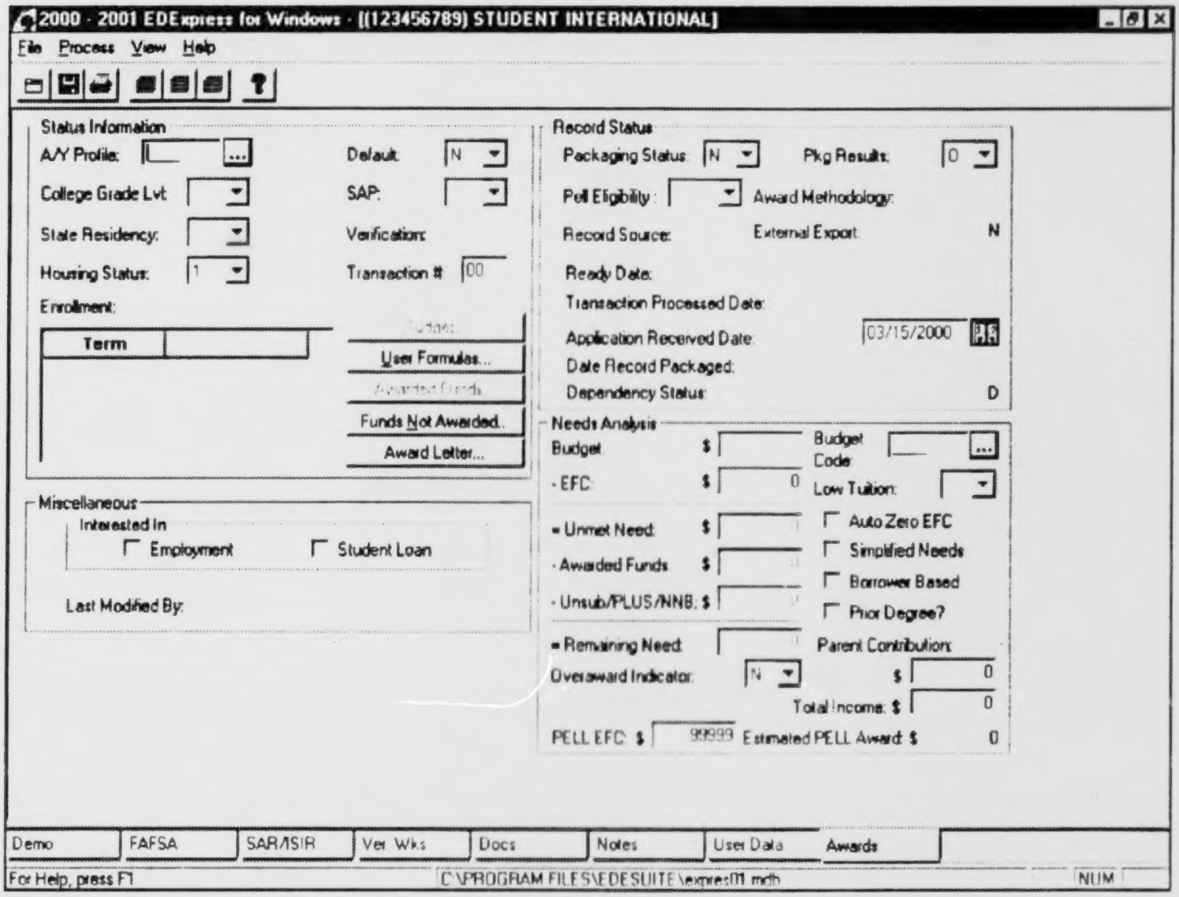
Latest Original Student ID:

Active Transaction:
Notes Upd:
Record Upd:
Packaging Status:
Record Source: M
Document Status:
Loan Records? N
Pell Records? N

Institution Use:

For Help, press F1
C:\PROGRAM FILES\EDESUITE\expres01.mdb

The student's packaging record displays


File
Process
View
Help
Awarded Funds
Funds Not Awarded...
User Formulas...
Award Letter...
Demo
FAFSA
SAR/ISIR
Ver Wks
Docs
Notes
User Data
Awards

2000 - 2001 EDExpress for Windows - [(123456789) STUDENT INTERNATIONAL]

Status Information
A/Y Profile:
Default: N
College Grade Lvl:
SAP:
State Residency:
Verification:
Housing Status: 1
Transaction #: 00
Enrollment:

Term	

Record Status
Packaging Status: N
Pkg Results: 0
Pell Eligibility:
Award Methodology:
Record Source: External Export N
Ready Date:
Transaction Processed Date:
Application Received Date: 03/15/2000
Date Record Packaged:
Dependency Status: D

Needs Analysis
Budget $
Budget Code:
- EFC: $ 0
Low Tuition:
= Unmet Need: $
☐ Auto Zero EFC
- Awarded Funds $
☐ Simplified Needs
- Unsub/PLUS/NNB: $
☐ Borrower Based
☐ Prior Degree?
= Remaining Need:
Parent Contribution: $ 0
Overaward Indicator: N
Total Income: $ 0
PELL EFC: $ 99999
Estimated PELL Award: $ 0

Miscellaneous
Interested In
☐ Employment
☐ Student Loan
Last Modified By:

For Help, press F1
C:\PROGRAM FILES\EDESUITE\expres01.mdb
NUM

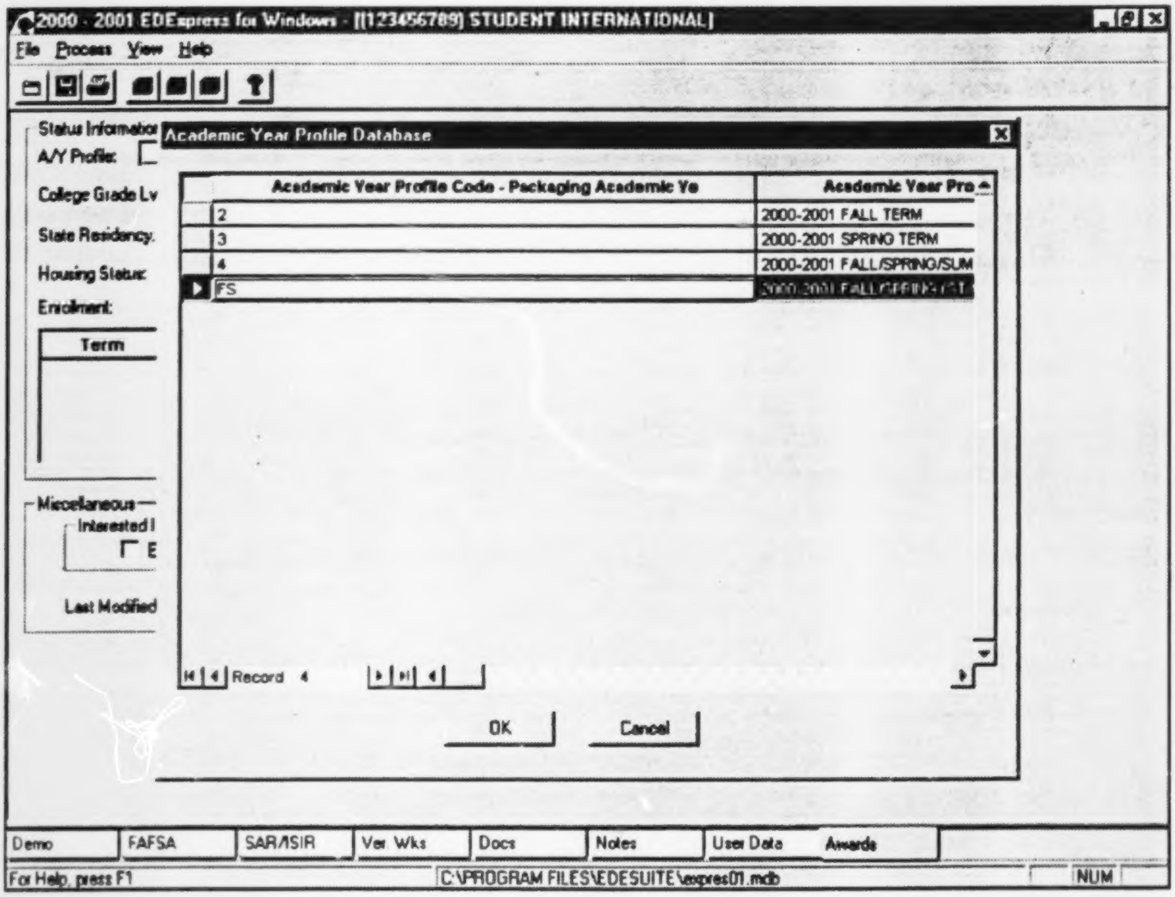
Click the ***A/Y Profile*** *button*

Select the appropriate AYP

Click ***OK***

Notice the fields that are populated with default values previously defined in the various setups.

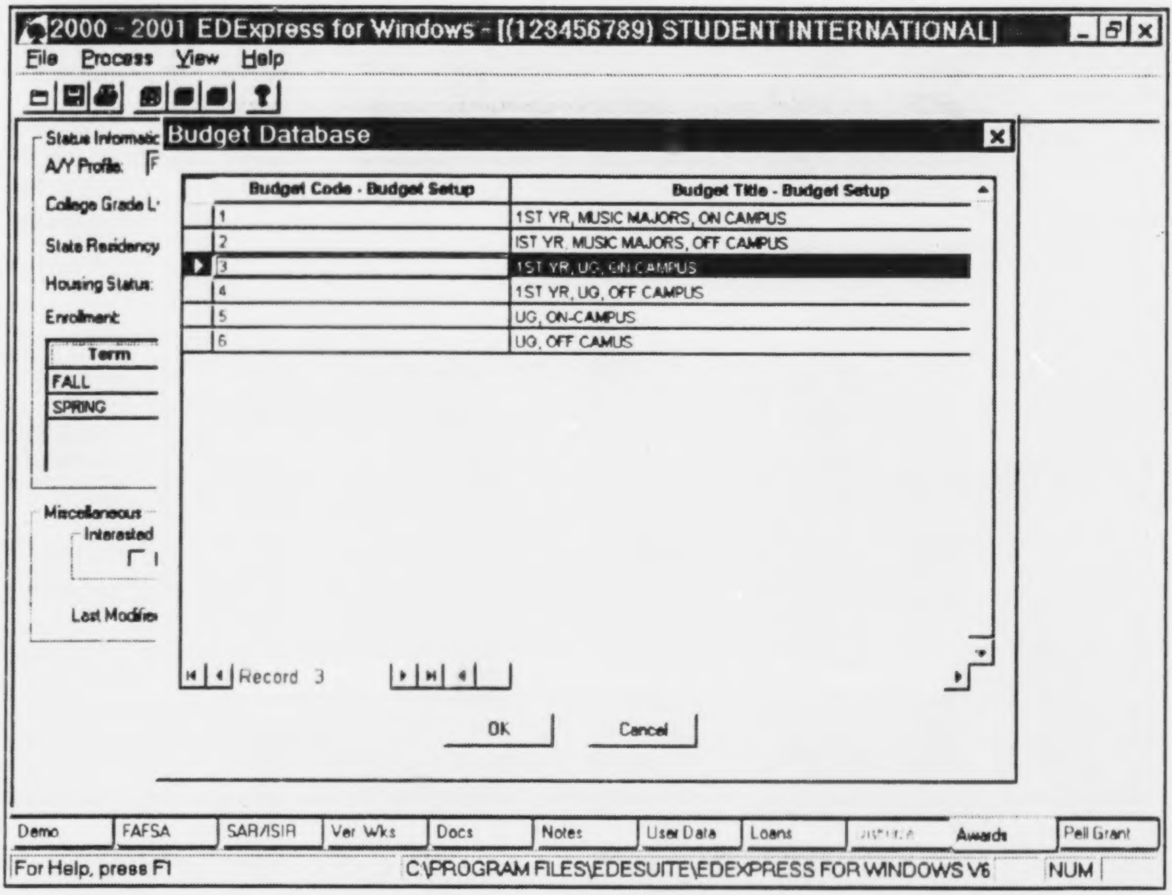
Also, notice that the Package icon is grayed out, indicating that the student is not ready to package and that required fields (A/Y Profile, College Grade Level, and Budget Code) need to be updated.


2000 - 2001 EDExpress for Windows - [[123456789] STUDENT INTERNATIONAL]
File
Process
View
Help
Status Information
A/Y Profile:
College Grade Lv
State Residency:
Housing Status:
Enrollment:
Term
Miscellaneous
Interested I
E
Last Modified
Academic Year Profile Database
Record 4
OK
Cancel
Demo
FAFSA
SAR/ISIR
Ver. Wks
Docs
Notes
User Data
Awards
For Help, press F1
C:\PROGRAM FILES\EDESUITE\expres01.mdb
NUM

Academic Year Profile Code - Packaging Academic Ye	Academic Year Pro
2	2000-2001 FALL TERM
3	2000-2001 SPRING TERM
4	2000-2001 FALL/SPRING/SUM
FS	2000-2001 FALL/SPRING/ST

*Click the **Budget Code** button and select the appropriate budget code*

*Click **OK***


2000 - 2001 EDExpress for Windows - [(123456789) STUDENT INTERNATIONAL]
File
Process
View
Help
Status Information
A/Y Profile:
College Grade L
State Residency
Housing Status:
Enrollment
Term
FALL
SPRING
Miscellaneous
Interested
Last Modified
Budget Database
Record 3
OK
Cancel
Demo
FAFSA
SAR/ISIR
Ver Wks
Docs
Notes
User Data
Loans
Awards
Pell Grant
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

Budget Code - Budget Setup	Budget Title - Budget Setup
1	1ST YR, MUSIC MAJORS, ON CAMPUS
2	IST YR, MUSIC MAJORS, OFF CAMPUS
3	1ST YR, UG, ON CAMPUS
4	1ST YR, UG, OFF CAMPUS
5	UG, ON-CAMPUS
6	UG, OFF CAMUS

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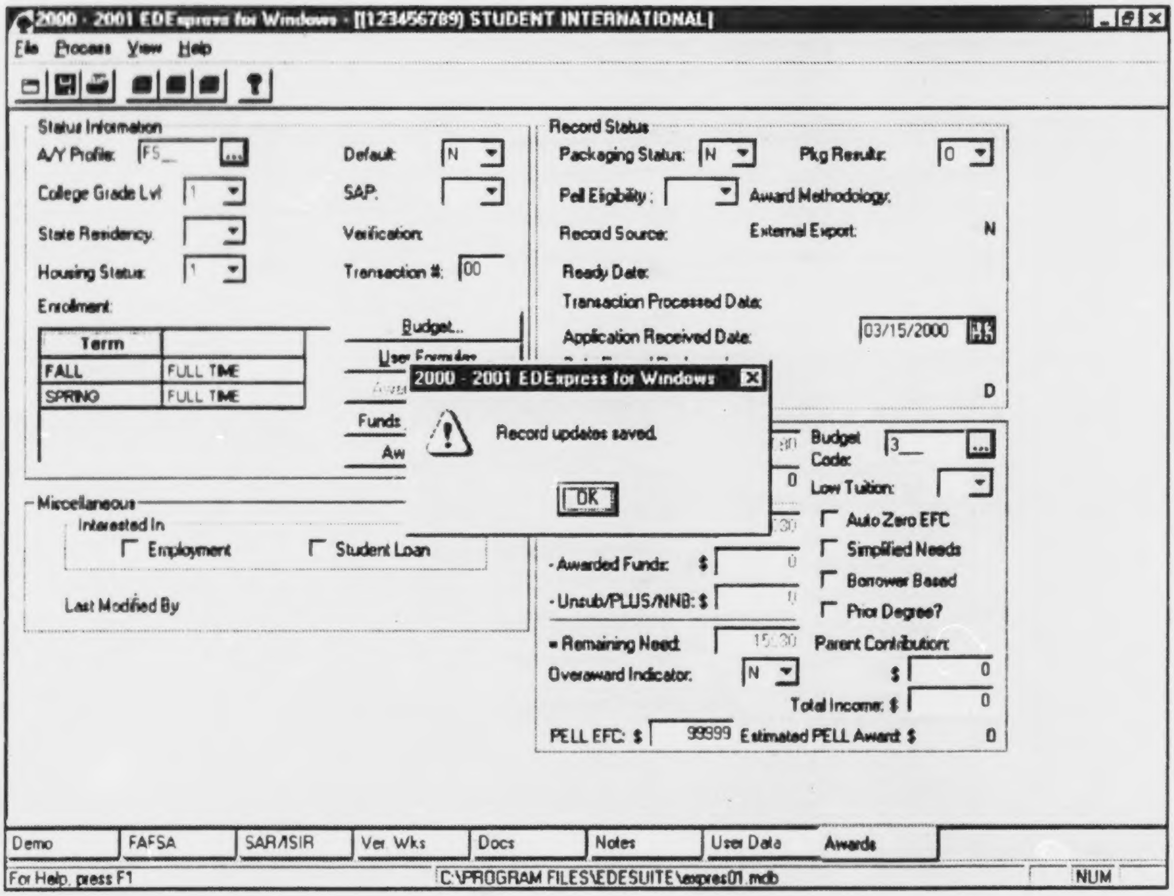
*Click the **College Grade Level** down arrow and select the correct value for this student*

Update any other fields as needed

*Click the **Save** icon*

*Click **OK***


2000 - 2001 EDExpress for Windows - [(123456789) STUDENT INTERNATIONAL]

Status Information
A/Y Profile: FS__
College Grade Lvl: 1
State Residency:
Housing Status: 1
Default: N
SAP:
Verification:
Transaction #: 00

Enrollment:

Term	
FALL	FULL TIME
SPRING	FULL TIME

Record Status
Packaging Status: N
Pkg Result: 0
Pell Eligibility:
Award Methodology:
Record Source:
External Export: N
Ready Date:
Transaction Processed Date:
Application Received Date: 03/15/2000

2000 - 2001 EDExpress for Windows
Record updates saved.

Budget Code: 3__
Low Tuition:
☐ Auto Zero EFC
☐ Simplified Needs
☐ Borrower Based
☐ Prior Degree?
- Awarded Funds: $ 0
- Unsub/PLUS/NNB: $ 0
= Remaining Need: 15130
Overaward Indicator: N
Parent Contribution: $ 0
Total Income: $ 0
PELL EFC: $ 99999
Estimated PELL Award: $ 0

Miscellaneous
Interested In
☐ Employment
☐ Student Loan
Last Modified By

For Help, press F1
C:\PROGRAM FILES\EDESUITE\expres01.mdb

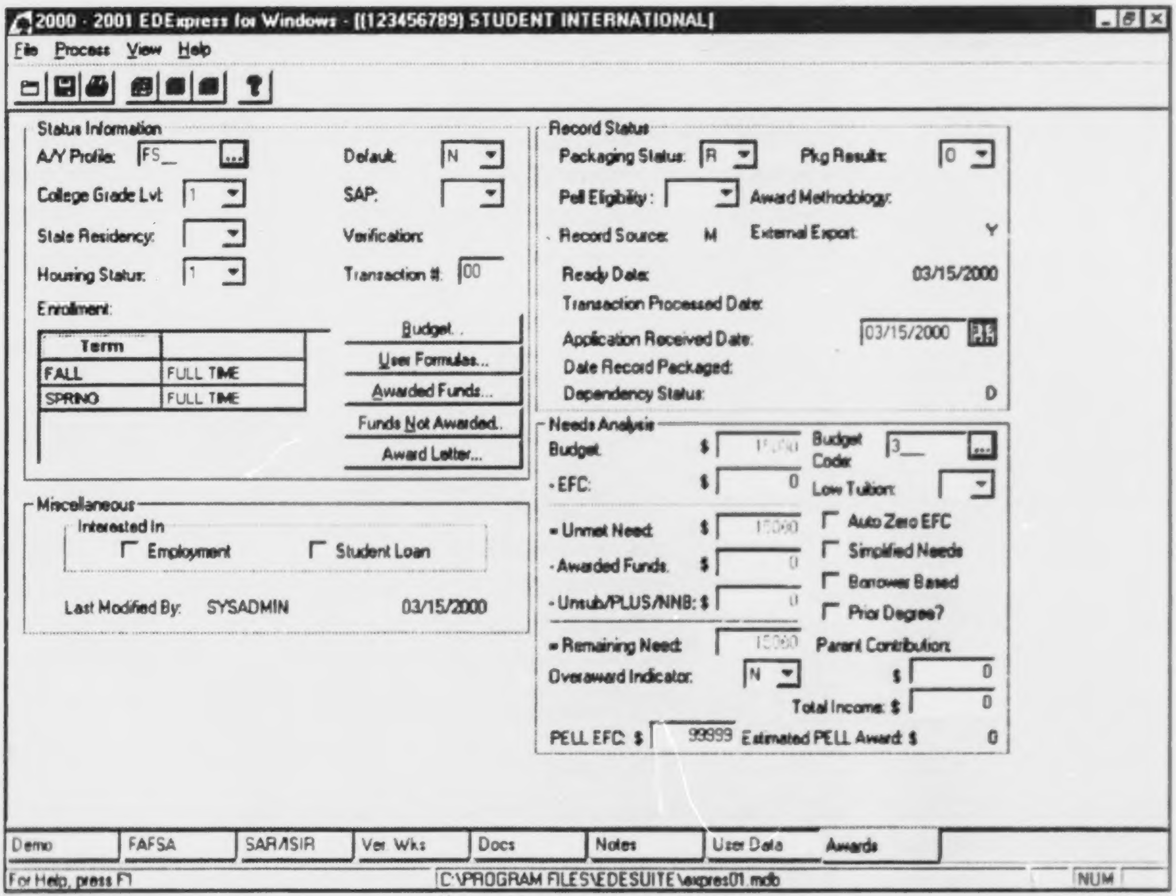
The Package icon is now visible

The Packaging Status updates to R

The Enrollment Term is updated

The Needs Analysis fields are recalculated

You're now ready to work with the student's award package


2000 - 2001 EDExpress for Windows - [(123456789) STUDENT INTERNATIONAL]

File
Process
View
Help

Status Information
A/Y Profile: FS_
Default: N
College Grade Lvl: 1
SAP:
State Residency:
Verification:
Housing Status: 1
Transaction #: 00

Enrollment:

Term	
FALL	FULL TIME
SPRING	FULL TIME

Budget...
User Formulas...
Awarded Funds...
Funds Not Awarded...
Award Letter...

Miscellaneous
Interested In
☐ Employment ☐ Student Loan
Last Modified By: SYSADMIN 03/15/2000

Record Status
Packaging Status: R
Pkg Results: 0
Pell Eligibility:
Award Methodology:
Record Source: M
External Export: Y
Ready Date: 03/15/2000
Transaction Processed Date:
Application Received Date: 03/15/2000
Date Record Packaged:
Dependency Status: D

Needs Analysis
Budget: $ 15060
Budget Code: 3_
- EFC: $ 0
Low Tuition:
= Unmet Need: $ 15060
- Awarded Funds: $ 0
- Unsub/PLUS/NNB: $ 0
= Remaining Need: 15060
☐ Auto Zero EFC
☐ Simplified Needs
☐ Borrower Based
☐ Prior Degree?
Parent Contribution: $ 0
Overaward Indicator: N
Total Income: $ 0
PELL EFC: $ 99999
Estimated PELL Award: $ 0

Demo
FAFSA
SAR/ISIR
Ver. Wks
Docs
Notes
User Data
Awards
For Help, press F1
C:\PROGRAM FILES\EDESUITE\expres01.mdb
NUM

Process Function

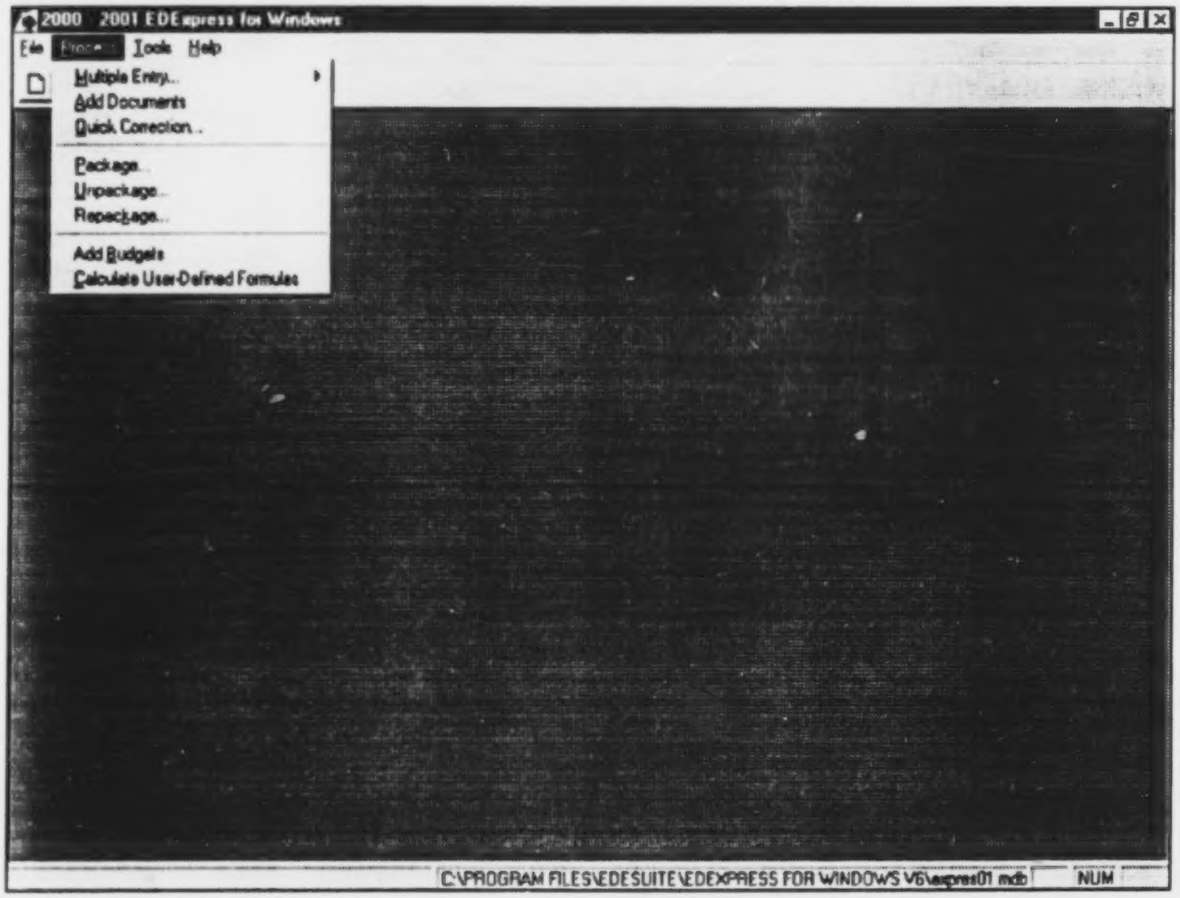
Along with what you learned thus far about the various setups, you've been introduced briefly to another feature of EDExpress—Process. This feature allows you to perform batch processes and data entry for groups of students at one time. Before you begin working with student records, you should become familiar with this time-saving tool.

The individual functions that can be performed under Process include:

- Multiple Entry
- Add Documents
- Quick Correction
- Package
- Unpackage
- Repackage
- Add Budgets
- Calculate User-defined Formulas

Generally, these Process functions impact only records in the Packaging database. When you select Add Documents and Calculate User-defined Formulas, these functions automatically update all records in the Packaging database. The other functions allow you to select which student records you want to update by selecting a file, entering multiple social security numbers, or selecting a query.

[Slides 3-19 and 3-20]


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Multiple Entry...
Add Documents
Quick Correction...
Package...
Unpackage...
Repackage...
Add Budgets
Calculate User-Defined Formulas
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\express01.mdb
NUM

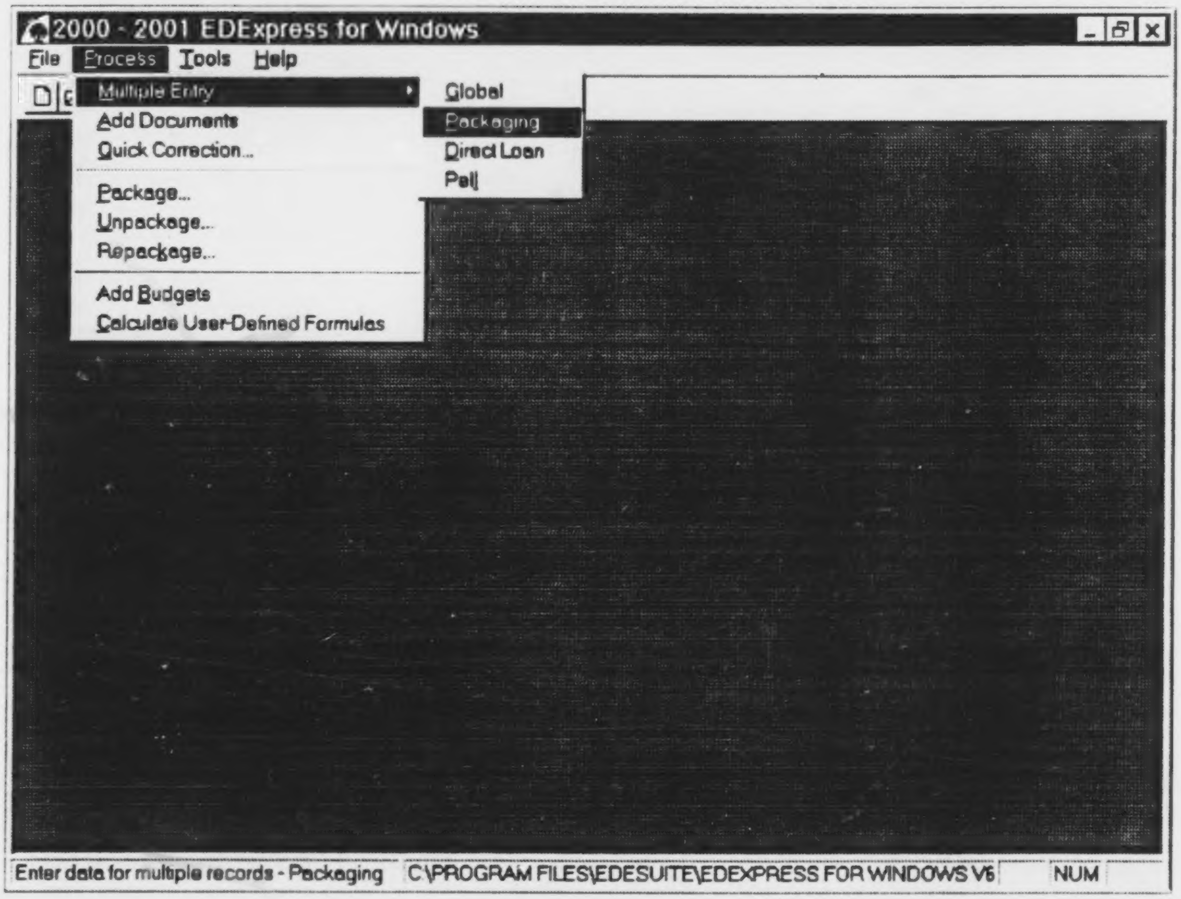
Multiple Entry of SAP Data Values

The Multiple Entry function is processed at either of two levels—Global or Packaging—and allows you to update various fields in demographic, packaging, and loan records.

Let's review the steps to processing a Multiple Entry function for records in the Packaging database.

To access the Multiple Entry feature for the Packaging Module

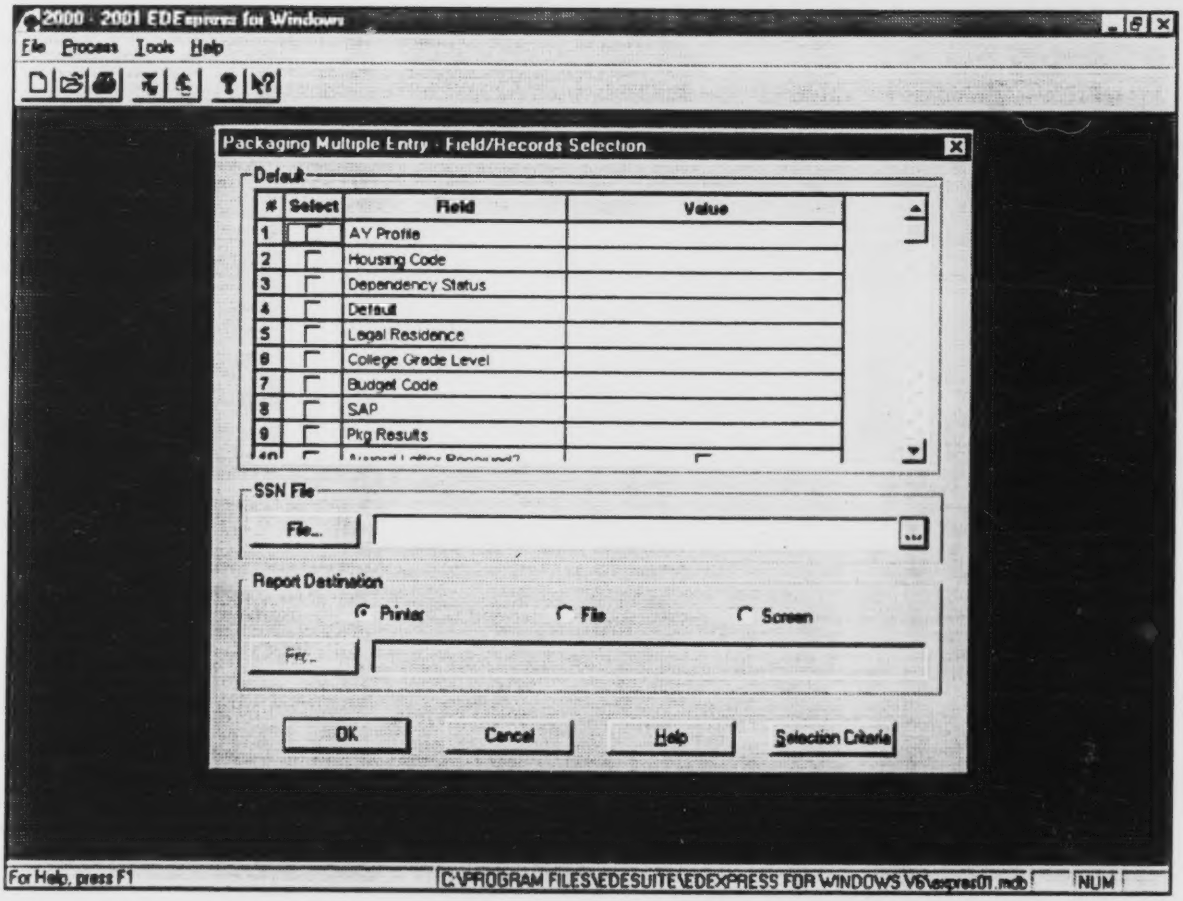
*Select **Process/ Multiple Entry/ Packaging** from the main menu*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Multiple Entry
Add Documents
Quick Correction...
Package...
Unpackage...
Repackage...
Add Budgets
Calculate User-Defined Formulas
Global
Packaging
Direct Loan
Pell
NUM

Enter data for multiple records - Packaging

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6

The Packaging Multiple Entry dialog box displays.


2000 - 2001 EDExpress for Windows
File Process Tools Help
Packaging Multiple Entry - Field/Records Selection
Default
SSN File
File...
Report Destination
Printer
File
Screen
File...
OK
Cancel
Help
Selection Criteria
For Help, press F1
NUM

#	Select	Field	Value
1	☐	AY Profile	
2	☐	Housing Code	
3	☐	Dependency Status	
4	☐	Default	
5	☐	Legal Residence	
6	☐	College Grade Level	
7	☐	Budget Code	
8	☐	SAP	
9	☐	Pkg Results	

Report Destination: ● Printer ○ File ○ Screen

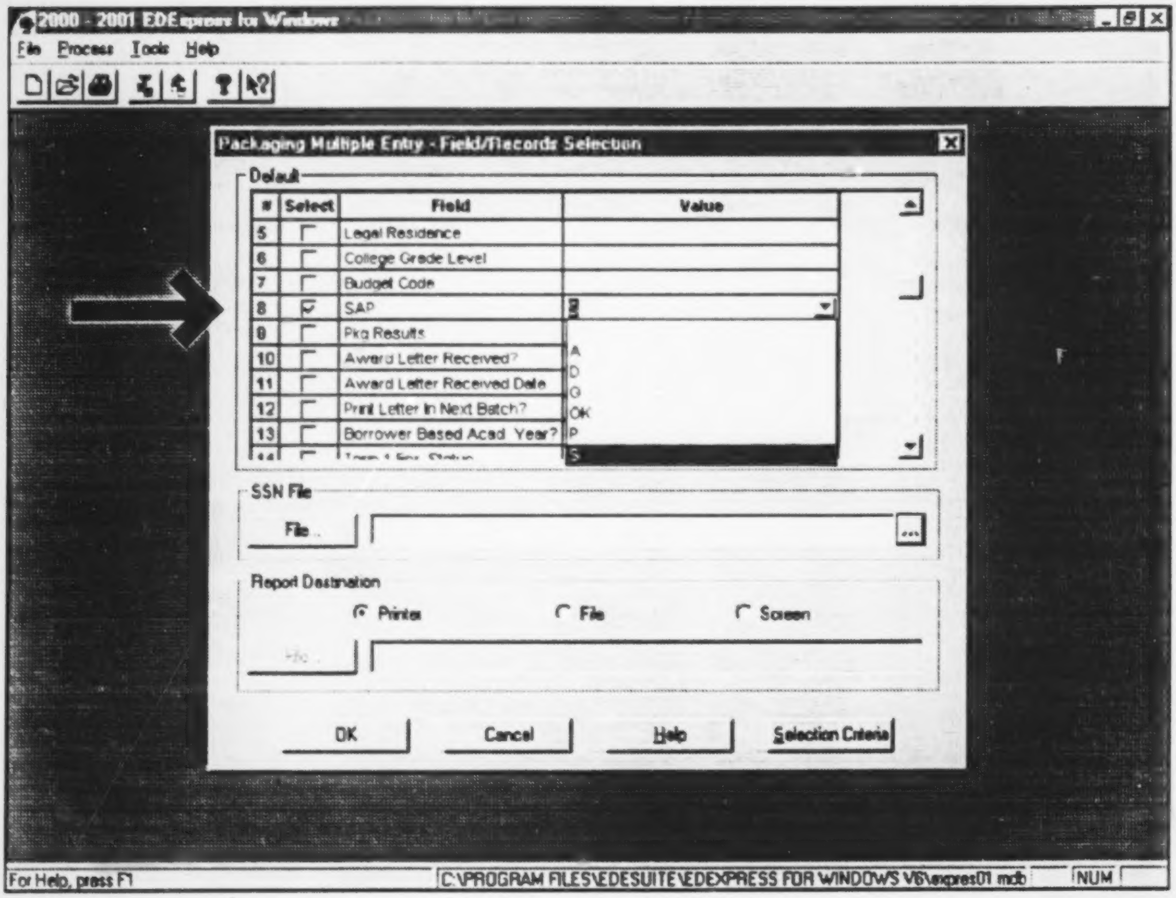
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

In this example, we are going to update the SAP value for a group of students who have been suspended from receiving financial aid

Scroll down until you find the field you want to update

*Click the **Select** box next to the field*

*Click the **Value** down arrow to select the value you want to enter for the group of student records being updated*


2000 - 2001 EDExpress for Windows
File Process Tools Help
Packaging Multiple Entry - Field/Records Selection
Default
SSN File
File ..
Report Destination
● Printer
○ File
○ Screen
File ..
OK
Cancel
Help
Selection Criteria
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

#	Select	Field	Value
5	☐	Legal Residence	
6	☐	College Grade Level	
7	☐	Budget Code	
8	☑	SAP	S
9	☐	Pkg Results	A
10	☐	Award Letter Received?	D
11	☐	Award Letter Received Date	G
12	☐	Print Letter In Next Batch?	OK
13	☐	Borrower Based Acad. Year?	P
			S

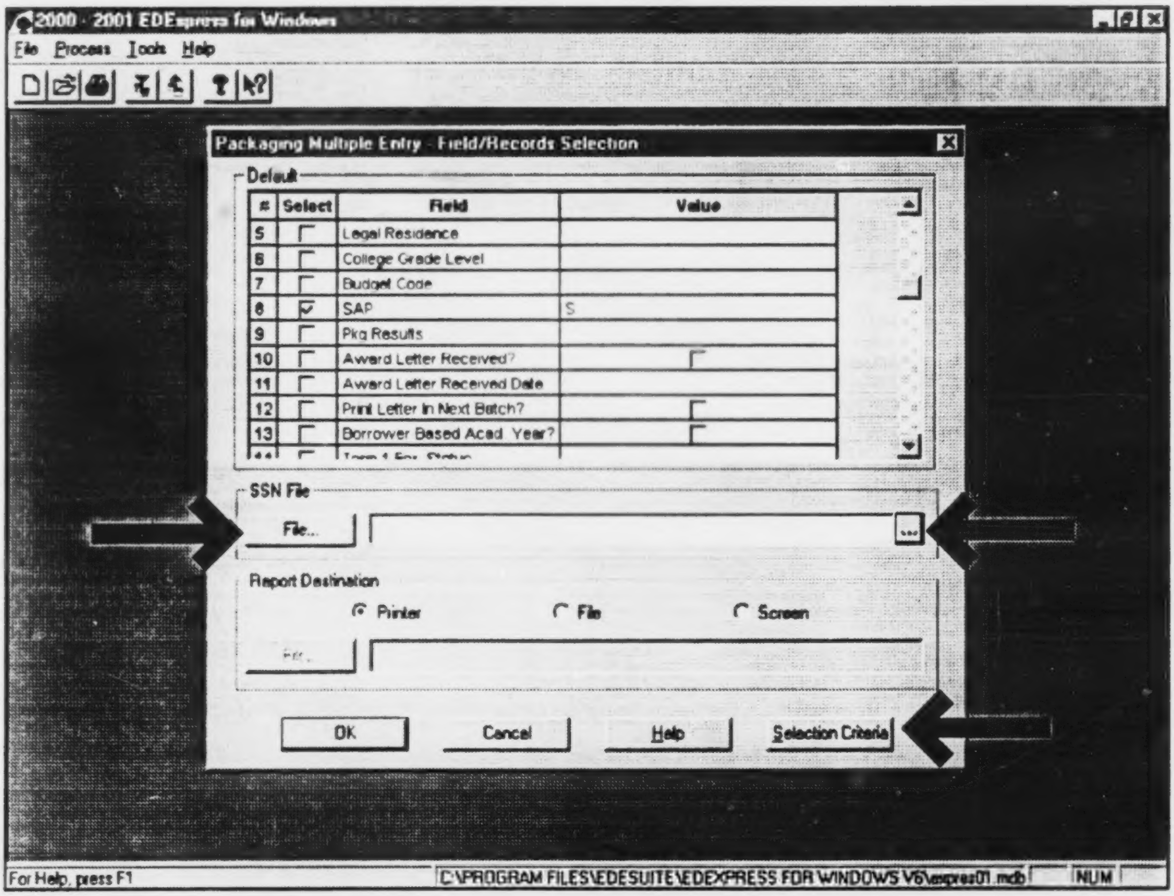
Next, select or enter the group of student records to be updated

*1 Click **File** to display the listing of file names from which to select the one you want, or*

*2 Click the **ellipsis button** (...) and enter the Social Security Number for each of the student records you want, or*

*3 Click **Selection Criteria***

Select the query that specifies the group of students you want, or select records to display a list of SSNs


2000 - 2001 EDExpress for Windows
File Process Tools Help

Packaging Multiple Entry - Field/Records Selection

Default

#	Select	Field	Value
5	☐	Legal Residence	
6	☐	College Grade Level	
7	☐	Budget Code	
8	☑	SAP	S
9	☐	Pkg Results	
10	☐	Award Letter Received?	☐
11	☐	Award Letter Received Date	
12	☐	Print Letter In Next Batch?	☐
13	☐	Borrower Based Acad. Year?	☐

SSN File

File...
...

Report Destination

● Printer ○ File ○ Screen

File...
OK
Cancel
Help
Selection Criteria

For Help, press F1

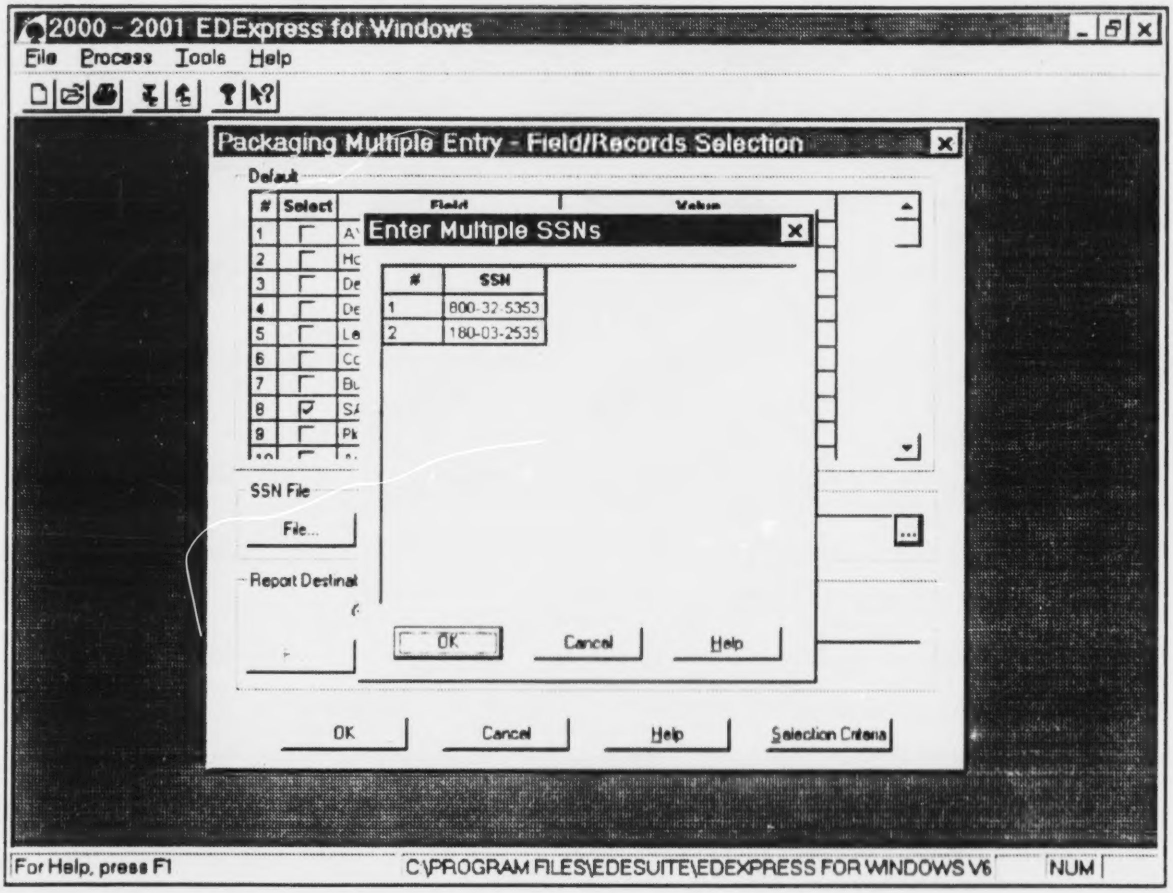
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

In this example, multiple student Social Security Numbers are entered

Click the ***ellipsis button***

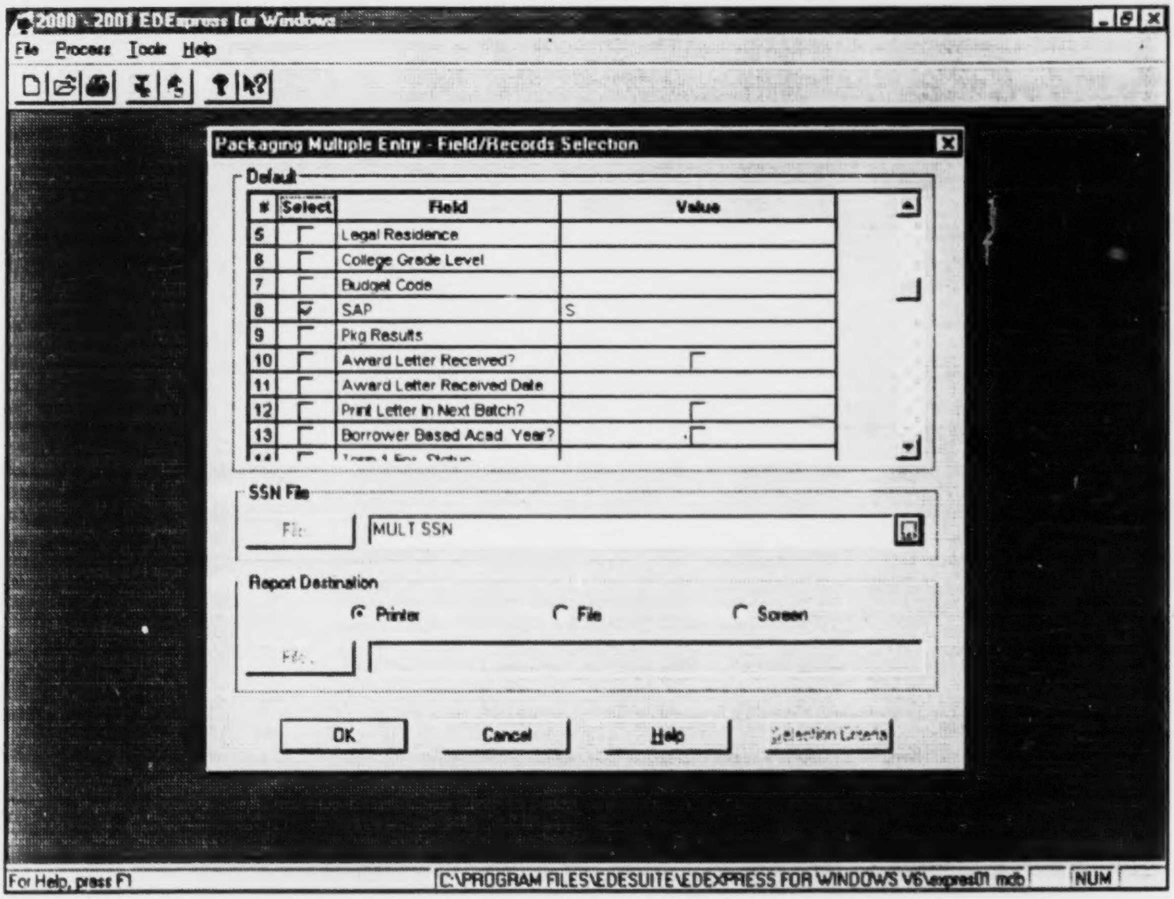
Then, enter the Social Security Numbers

Click ***OK***


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Packaging Multiple Entry - Field/Records Selection
Default
#
Select
Field
Value
SSN File
File...
Report Destinat
OK
Cancel
Help
Selection Criteria
Enter Multiple SSNs
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

#	SSN
1	800-32-5353
2	180-03-2535

Click ***OK*** *a second time*


2000 - 2001 EDExpress for Windows
File Process Tools Help

Packaging Multiple Entry - Field/Records Selection

Default

#	Select	Field	Value
5	☐	Legal Residence	
6	☐	College Grade Level	
7	☐	Budget Code	
8	☑	SAP	S
9	☐	Pkg Results	
10	☐	Award Letter Received?	☐
11	☐	Award Letter Received Date	
12	☐	Print Letter In Next Batch?	☐
13	☐	Borrower Based Acad. Year?	☐

SSN File

File... MULT SSN

Report Destination

● Printer ○ File ○ Screen

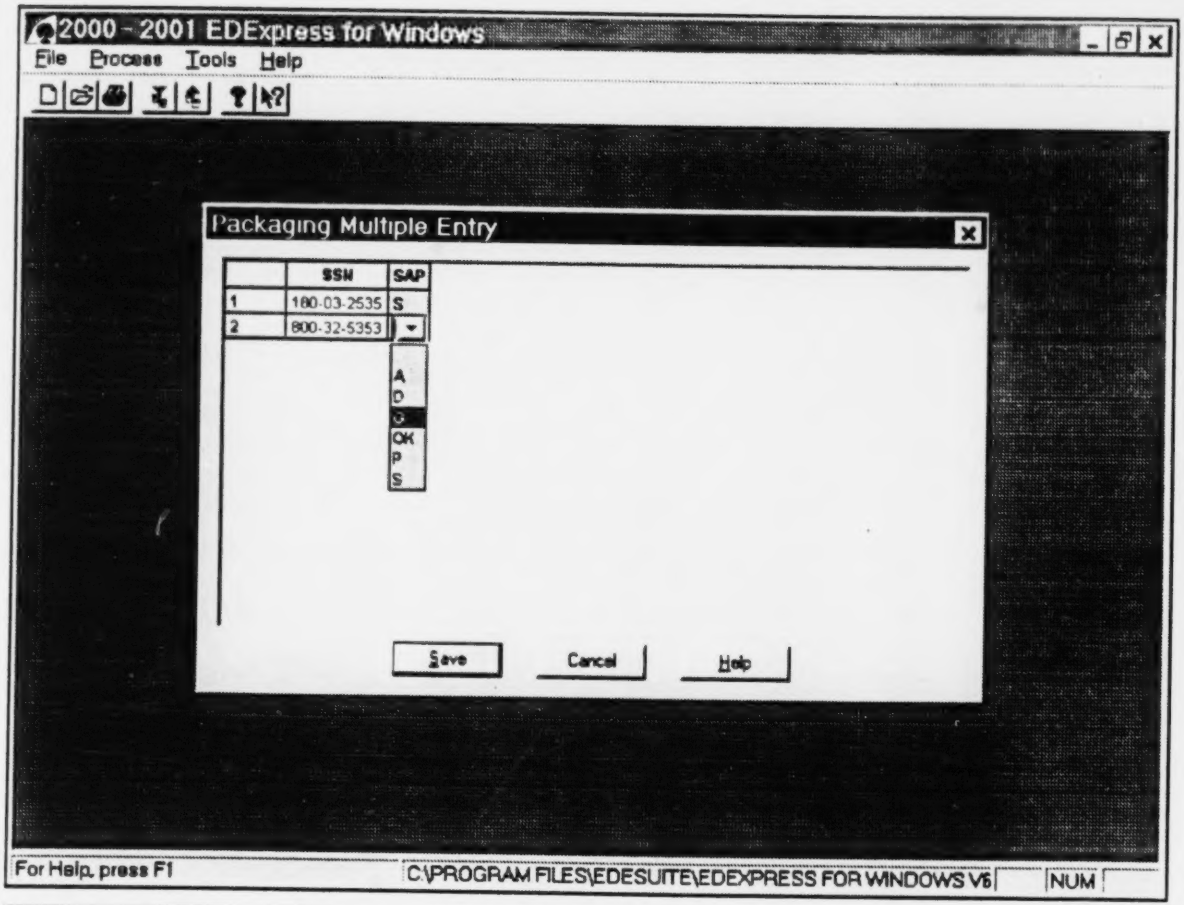
File...
OK
Cancel
Help
Selection Criteria

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\express01.mdb

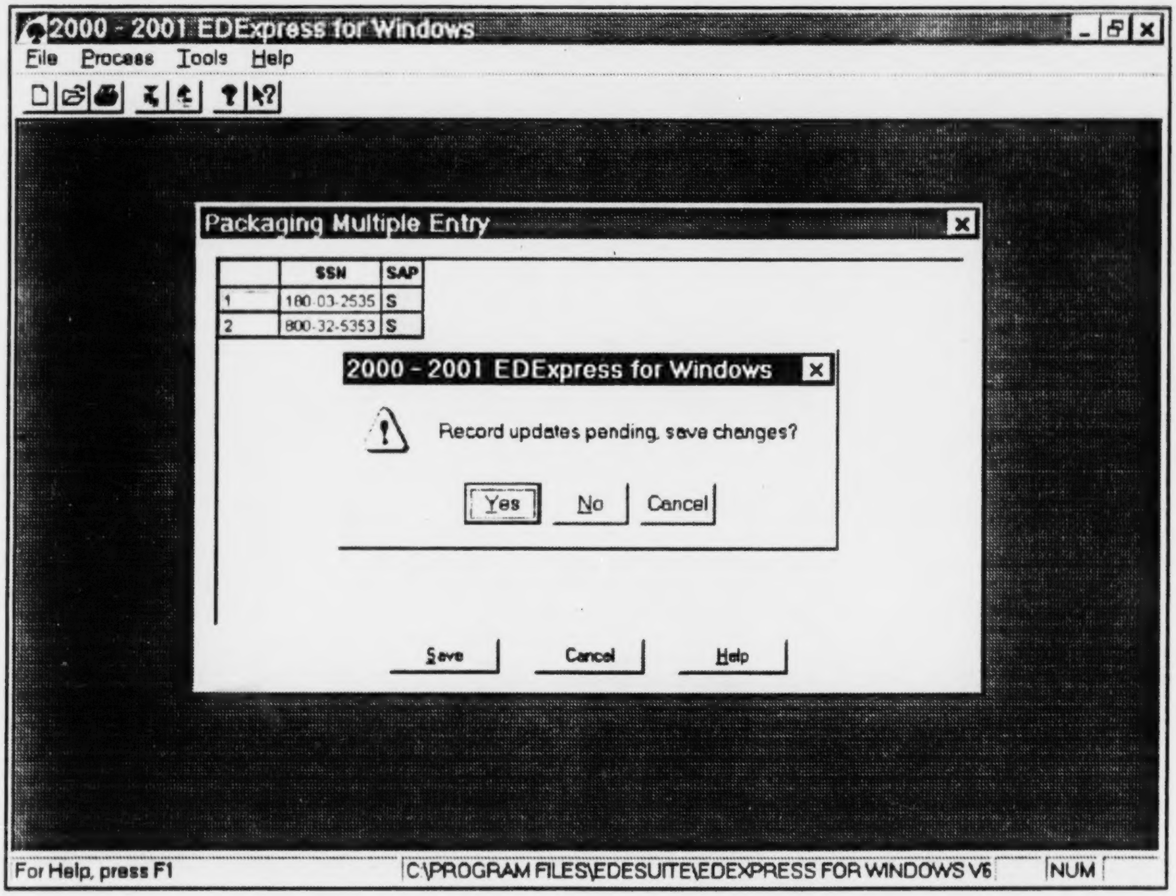
A dialog box appears and displays the student records that were processed

For each student record, you have the option of overriding the value entered


2000 - 2001 EDExpress for Windows
File Process Tools Help
Packaging Multiple Entry
A
D
G
OK
P
S
Save
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

	SSN	SAP
1	180-03-2535	S
2	800-32-5353	

*When you are ready to save the records, click **Save**, then **Yes***


2000 - 2001 EDExpress for Windows
File Process Tools Help
Packaging Multiple Entry

	SSN	SAP
1	180-03-2535	S
2	800-32-5353	S

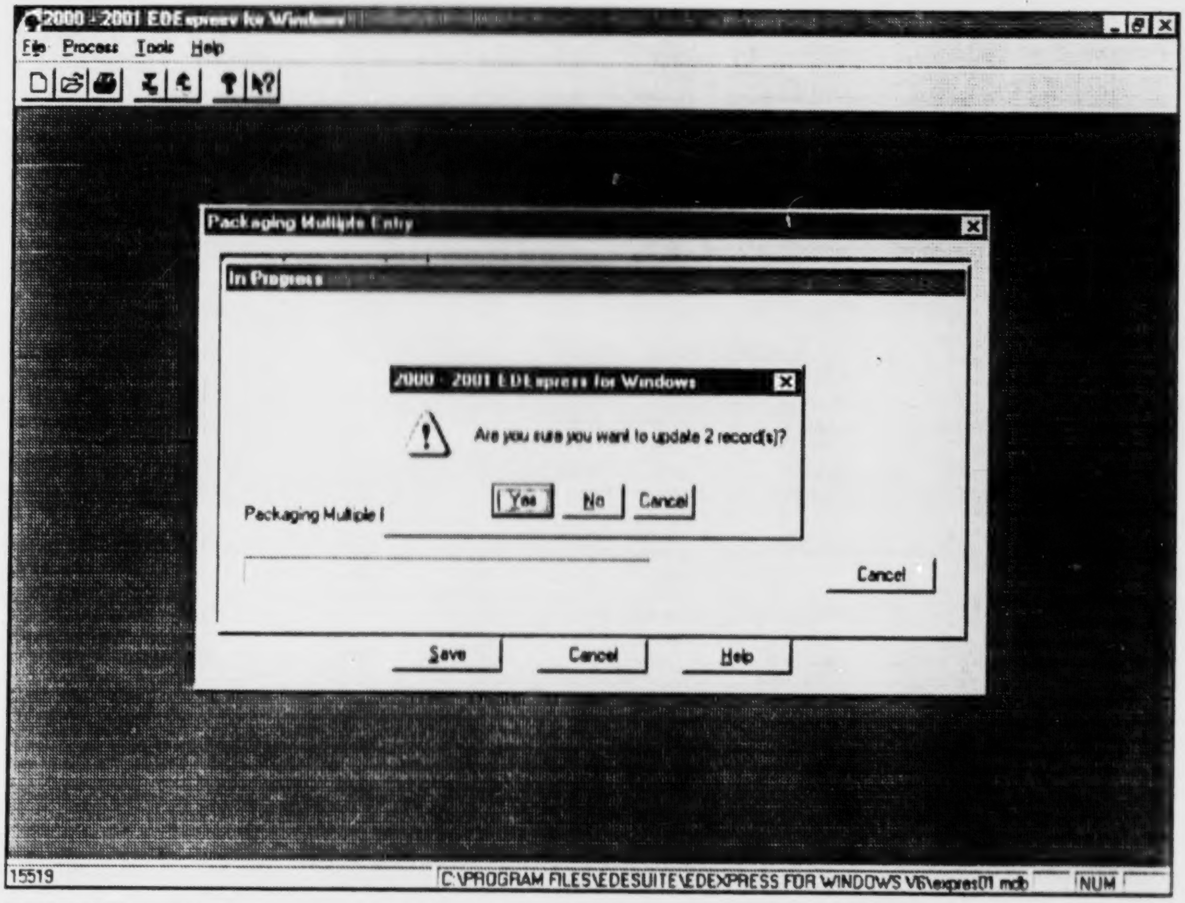
2000 - 2001 EDExpress for Windows

Record updates pending, save changes?

Yes
No
Cancel
Save
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

Another dialog box displays and asks you to verify that you want the records updated

Click ***Yes***



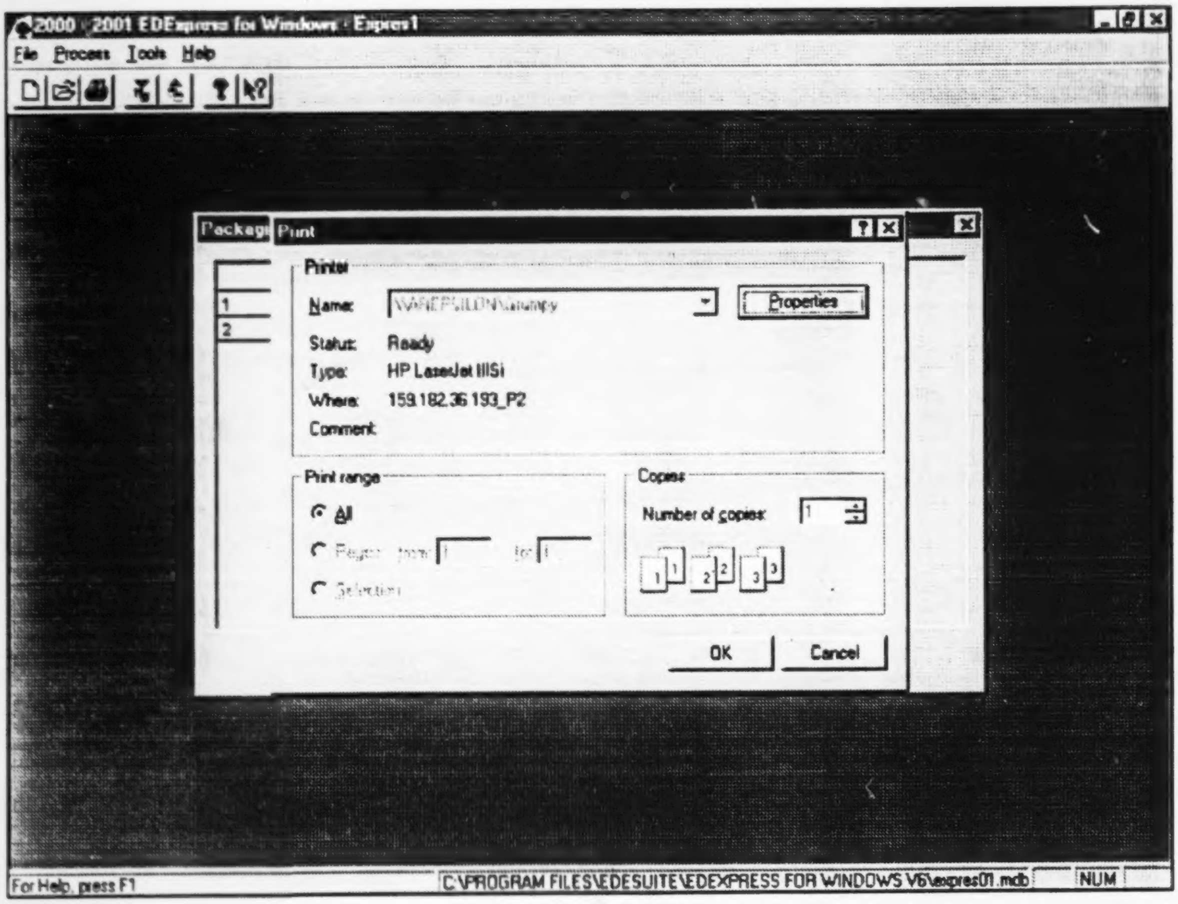
2000 - 2001 EDExpress for Windows
File Process Tools Help
Packaging Multiple Entry
In Progress
2000 - 2001 EDExpress for Windows

Are you sure you want to update 2 record(s)?

Yes
No
Cancel
Packaging Multiple I
Cancel
Save
Cancel
Help

15519 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb NUM

When the records have been updated, you are given the option of printing a report.



2000 - 2001 EDExpress for Windows - Expres1

Print

Printer

Status: Ready
Type: HP LaserJet IIISi
Where: 159.182.36.193_P2
Comment:

Print range
● All
○ Pages from 1 to 1
○ Selection

Copies
Number of copies: 1

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

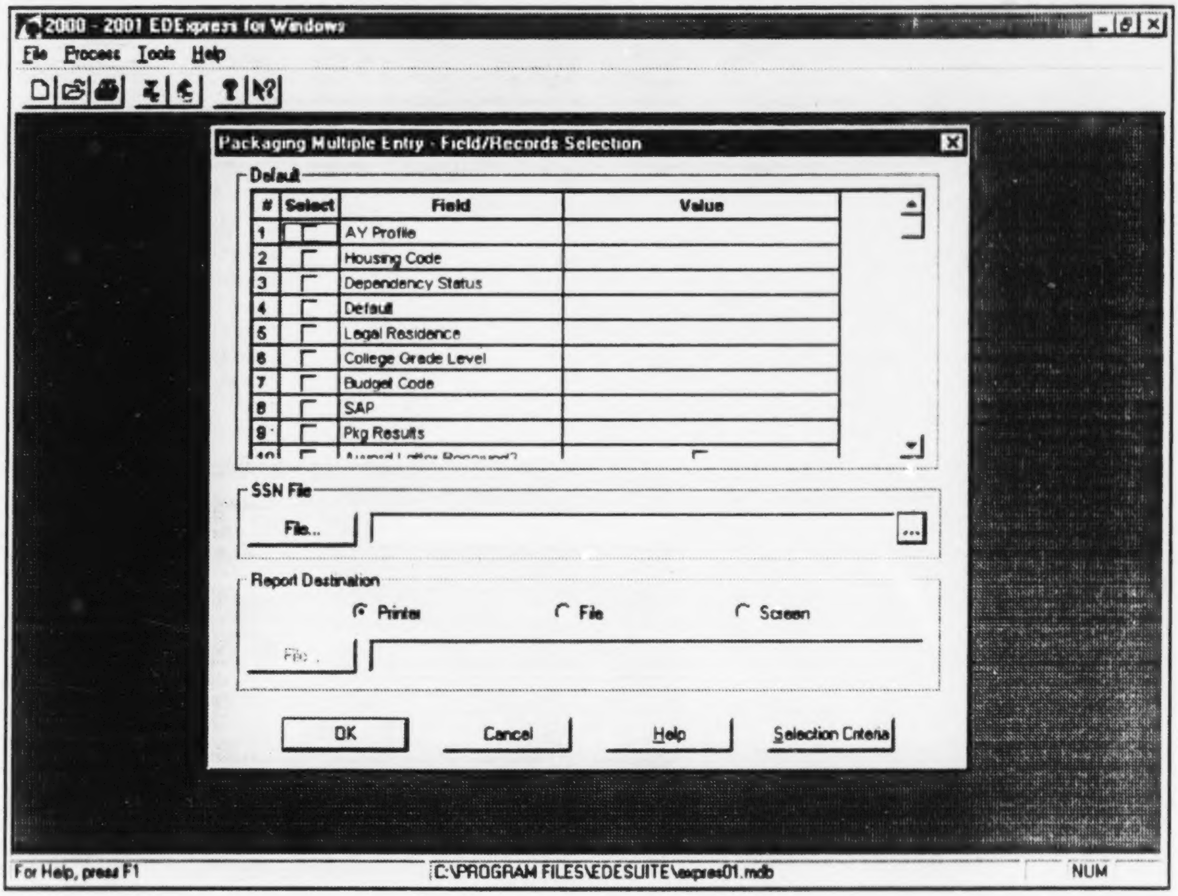
File
Process
Tools
Help
Packag
1
2
Name:
Properties
OK
Cancel
NUM

Tip: You can use Multiple Entry to award a particular fund to a student or groups of students only as long as there is a balance remaining in the fund

*After selecting **OK** to print or **Cancel**, you return to the Packaging Multiple Entry screen, if you selected the Return to Dialog option in Global System Setup*

*Click **OK** to continue updating records*

*Click **Cancel** to exit*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Packaging Multiple Entry - Field/Records Selection
Default
SSN File
File...
Report Destination
File...
OK
Cancel
Help
Selection Criteria

#	Select	Field	Value
1	☐	AY Profile	
2	☐	Housing Code	
3	☐	Dependency Status	
4	☐	Default	
5	☐	Legal Residence	
6	☐	College Grade Level	
7	☐	Budget Code	
8	☐	SAP	
9	☐	Pkg Results	

Report Destination: ● Printer ○ File ○ Screen

For Help, press F1
C:\PROGRAM FILES\EDESUITE\expres01.mdb
NUM

EDExpress Utilities Functions

To clear all records from a database

*Select **Tools/Utilities/ Clear Files** from the menu bar*

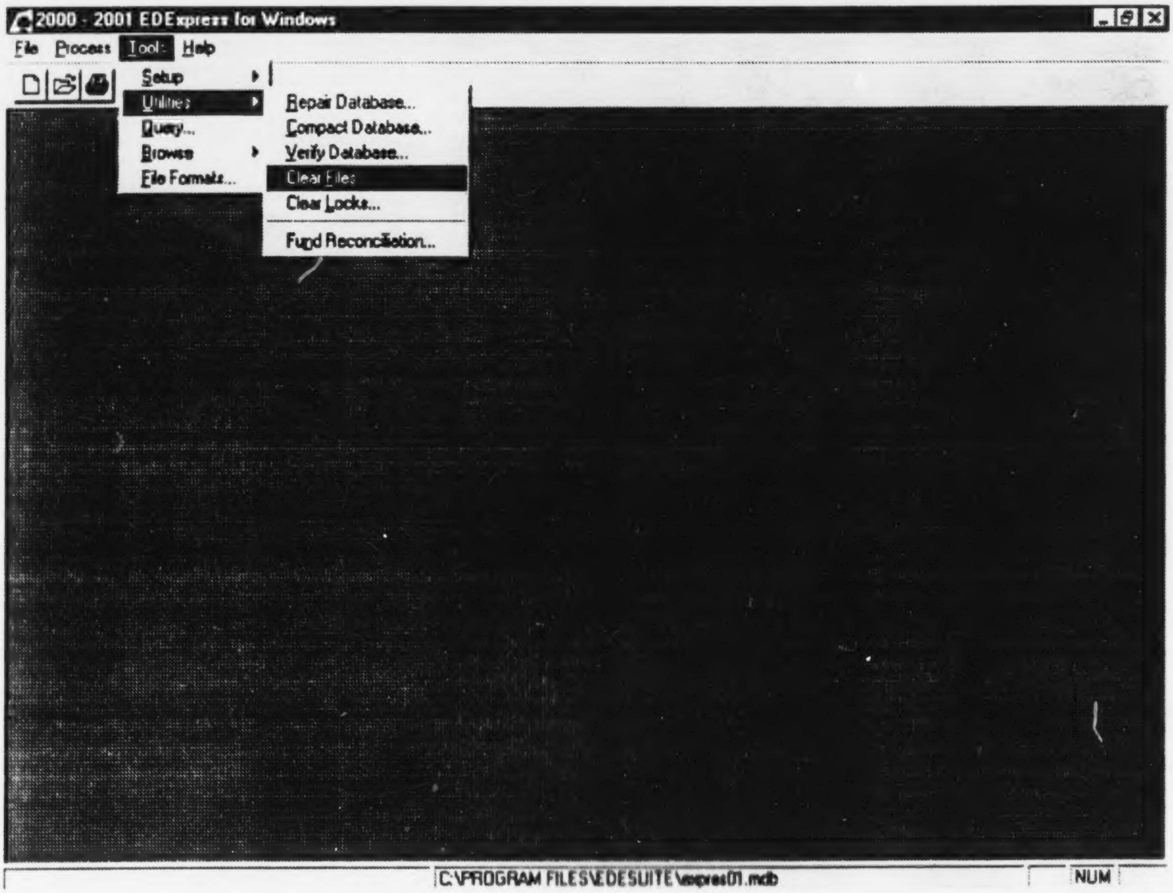
Clear Files

As you practice importing and manually entering data, you may need to modify the various setups you created. You may also need to clear records from your database and start over.

EDExpress has a Clear Files utility that allows you to clear files from the database of one or more its modules, such as the Packaging Database or the User Database. Use the Clear Files utility with care, since it can delete the contents of the entire EDExpress database.

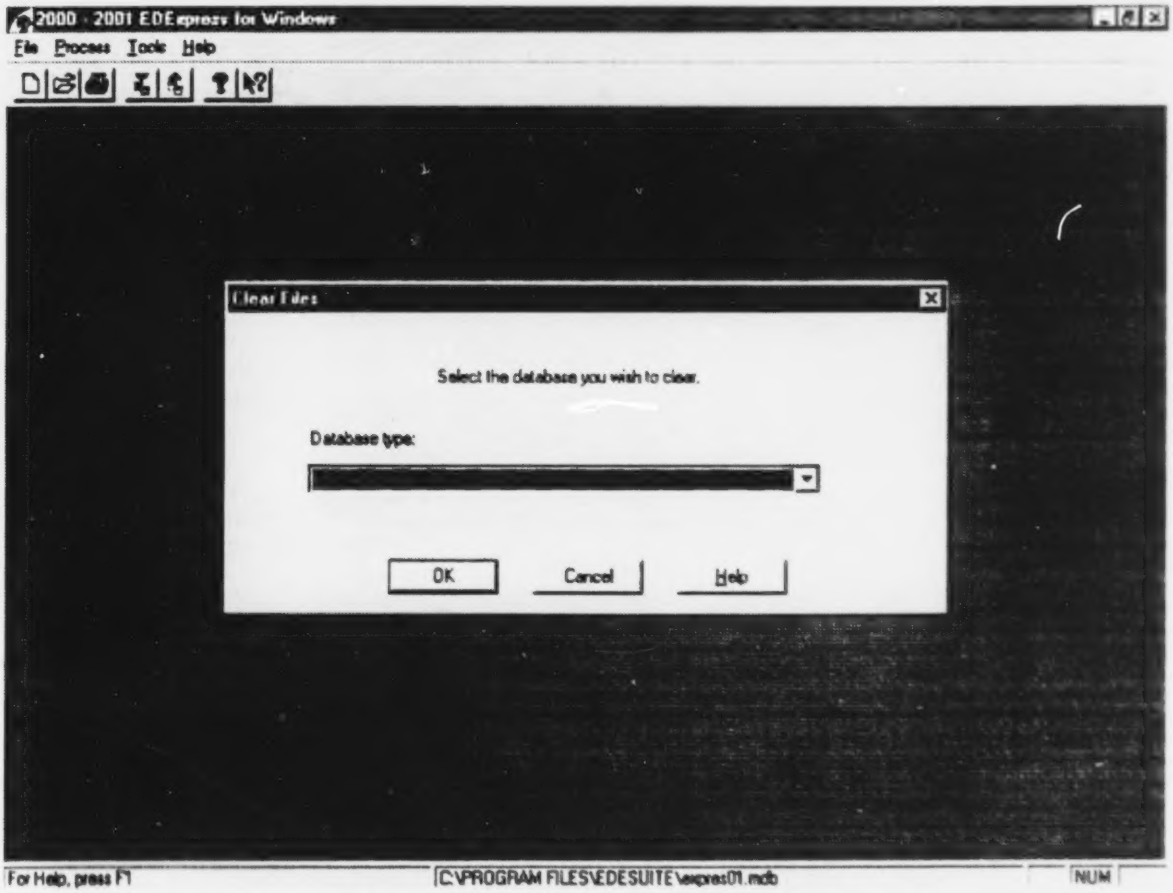
[Slide 3-21]

Tip: Back up your work before you use this utility.


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Setup
Utilities
Query...
Browse
File Formats...
Repair Database...
Compact Database...
Verify Database...
Clear Files
Clear Locks...
Fund Reconciliation...
C:\PROGRAM FILES\EDESUITE\expres01.mdb
NUM

The Clear Files dialog box displays

*Click the down arrow in the **Database Type** text box to display the list of databases*



2000 - 2001 EDExpress for Windows
File Process Tools Help
Clear Files
OK
Cancel
Help
For Help, press F1
NUM

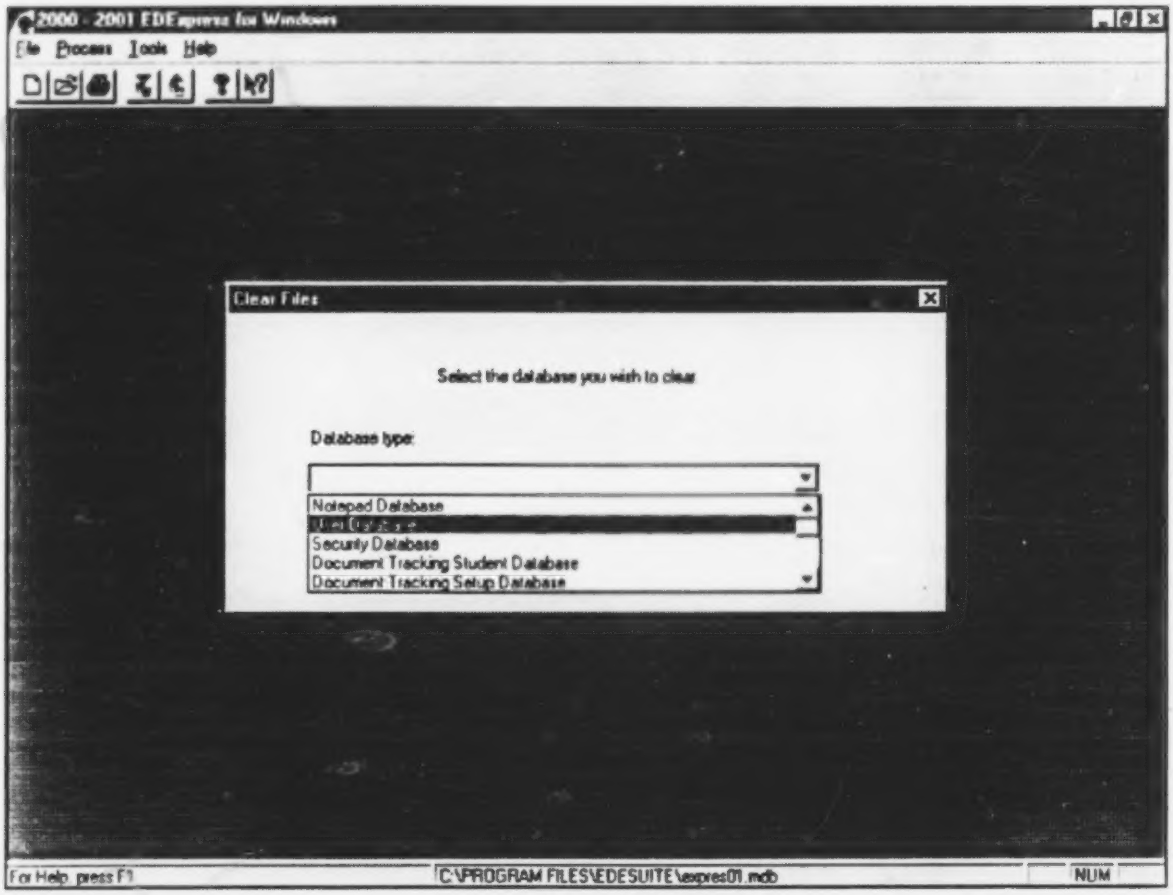
Select the database you wish to clear.

Database type:

C:\PROGRAM FILES\EDESUITE\expres01.mdb

Highlight the database you wish to clear

*Click **OK** to continue*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Clear Files
For Help, press F1
NUM

Select the database you wish to clear

Database type:

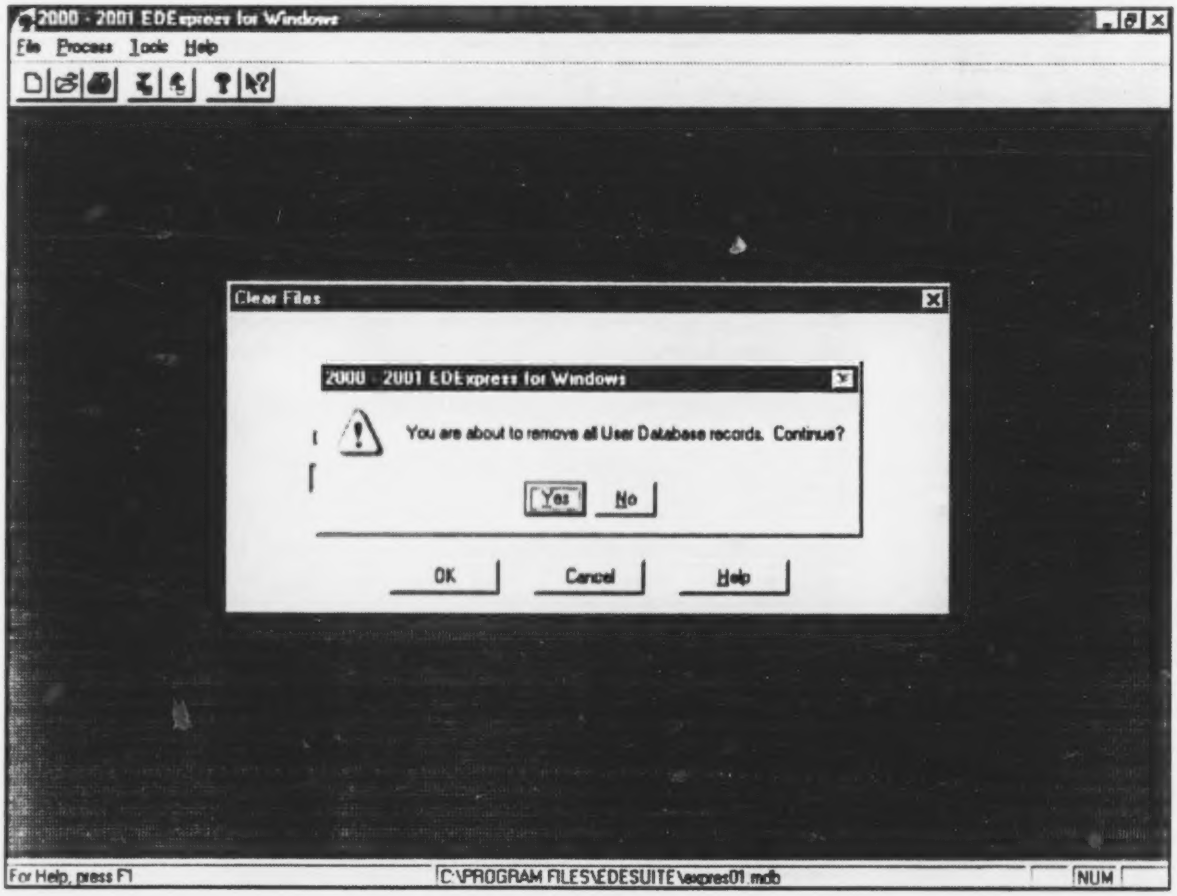
Notepad Database
User Database
Security Database
Document Tracking Student Database
Document Tracking Setup Database

C:\PROGRAM FILES\EDESUITE\expres01.mdb

Tip: Do not clear the Demographic, the Apps Express Batch Activity, and the Loan Batch Activity databases unless CPS Customer Service advises you to do so.

EDExpress prompts you to confirm that you want to remove all records from the database.

*Click **Yes** to clear the database.*



2000 - 2001 EDExpress for Windows

File Process Tools Help
Clear Files

2000 - 2001 EDExpress for Windows

You are about to remove all User Database records. Continue?

Yes
No
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\express01.mdb
NUM

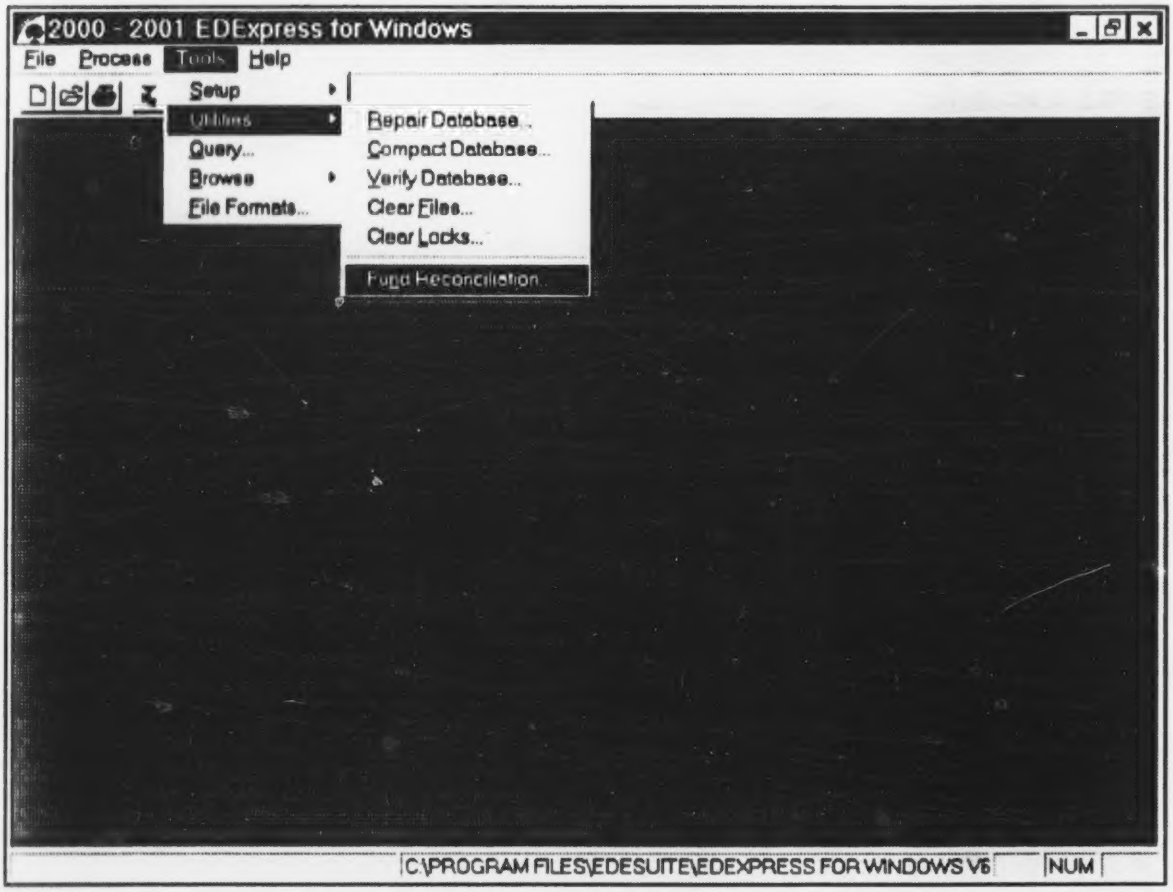
To reconcile the Maintenance table with the Packaging table

Select ***Tools/Utilities/ Fund Reconciliation*** *from the menu bar*

Fund Reconciliation

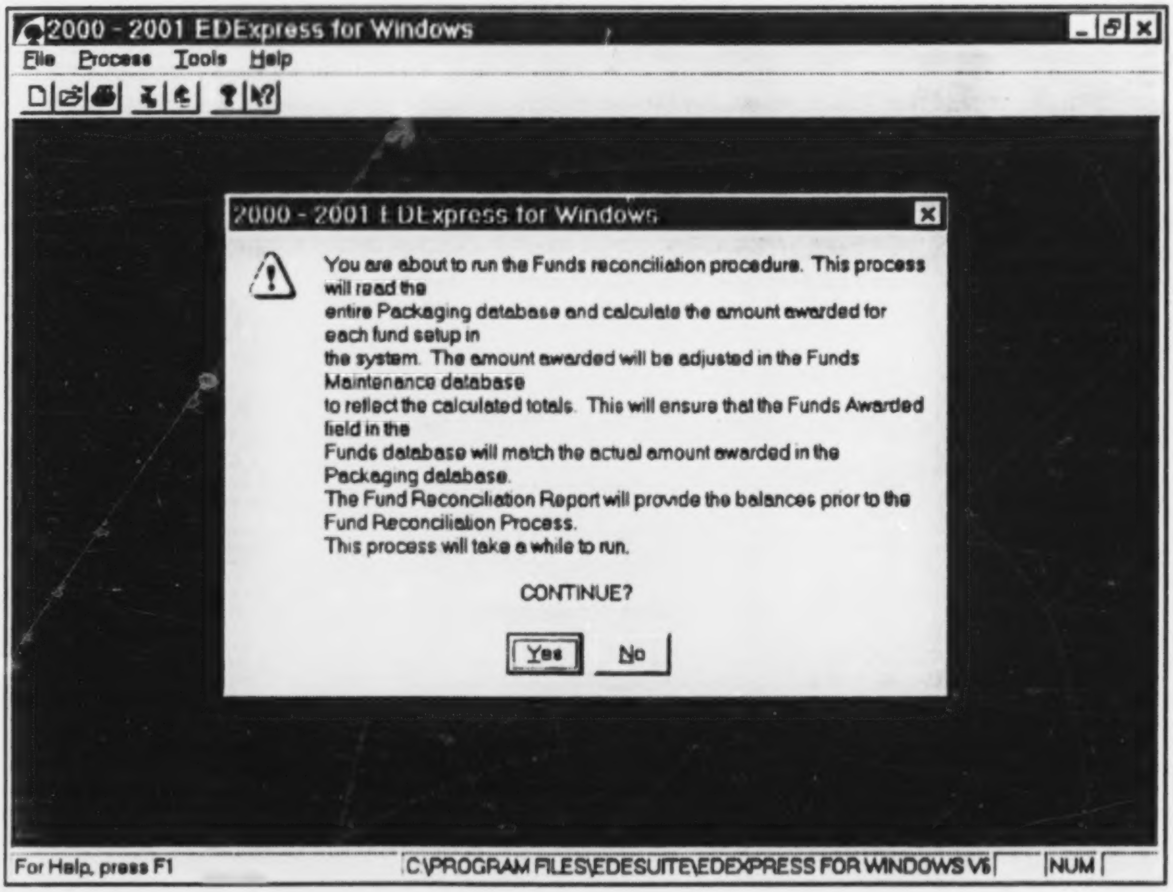
From time to time, the totals awarded from each fund in the Fund Maintenance table and the totals awarded to student records in the Packaging table get out of sync. To reconcile the totals awarded from these two tables, EDExpress includes a Funds Reconciliation function. Running the process resets the totals in the Fund Maintenance table.

[Slide 3-22]


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Setup
Utilities
Query...
Browse
File Formats...
Repair Database...
Compact Database...
Verify Database...
Clear Files...
Clear Locks...
Fund Reconciliation...
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

The 2000-2001 EDExpress for Windows dialog box displays a message indicating that the Funds Reconciliation process is about to run

*Click **Yes** to continue*



2000 - 2001 EDExpress for Windows
File Process Tools Help
2000 - 2001 EDExpress for Windows

You are about to run the Funds reconciliation procedure. This process will read the
entire Packaging database and calculate the amount awarded for each fund setup in
the system. The amount awarded will be adjusted in the Funds Maintenance database
to reflect the calculated totals. This will ensure that the Funds Awarded field in the
Funds database will match the actual amount awarded in the Packaging database.
The Fund Reconciliation Report will provide the balances prior to the Fund Reconciliation Process.
This process will take a while to run.

CONTINUE?

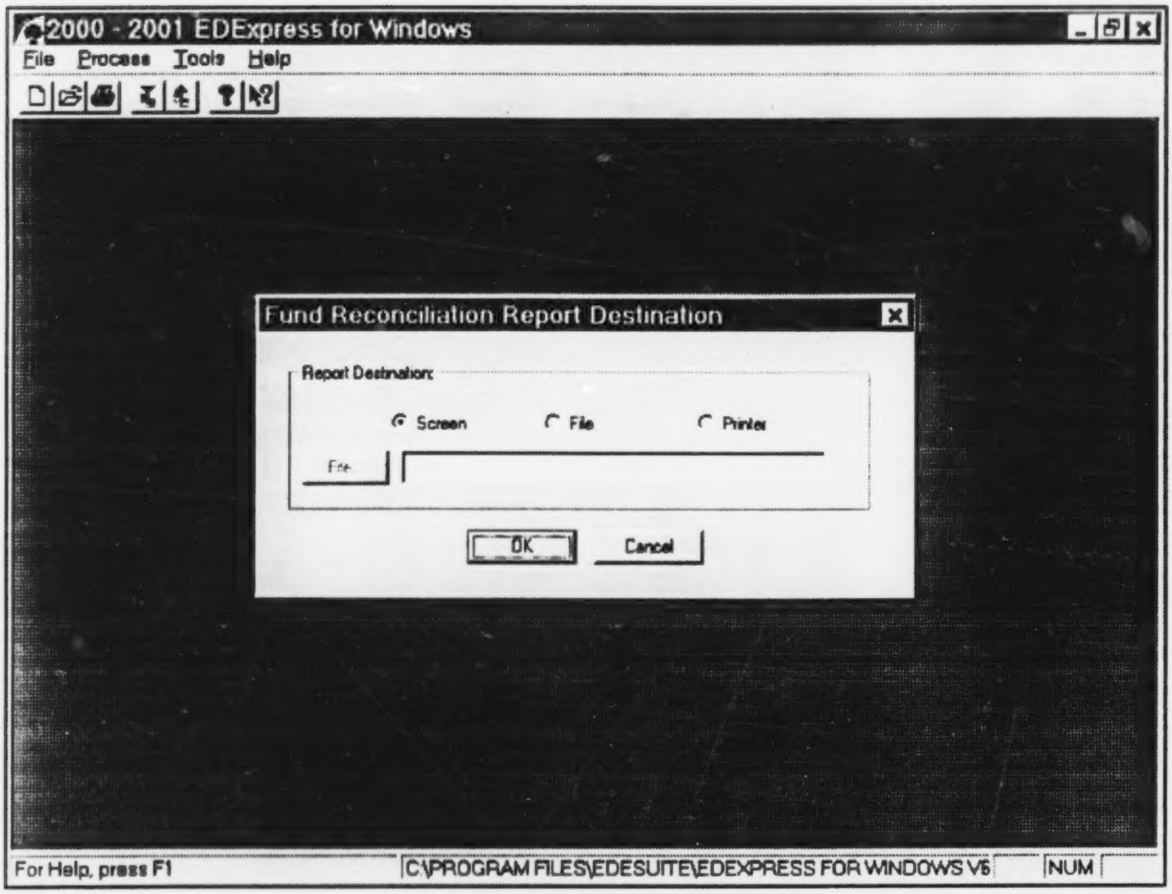
Yes
No
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

The Fund Reconciliation Report Destination dialog box displays.

*Click the **Report Destination** to which you want the report generated.*

*Click **OK**.*

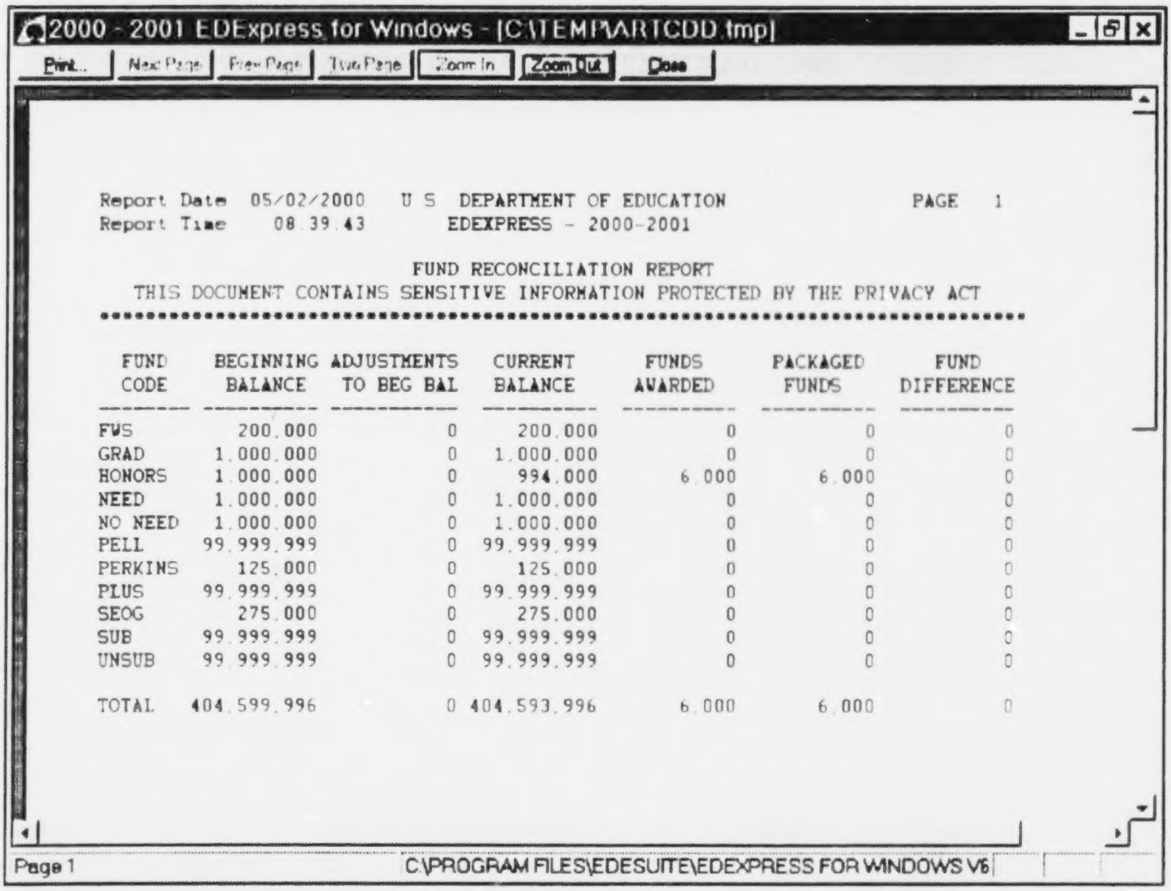
Tip *Because the Fund Reconciliation Report lists balances of the Funds prior to when the process was run, you should repeat the process to get an updated report listing corrected balances.*


2000 - 2001 EDExpress for Windows
File Process Tools Help
Fund Reconciliation Report Destination
Report Destination:
● Screen
○ File
○ Printer
File
OK
Cancel
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V5
NUM

Remember *You should repeat the process if you want an updated report listing corrected balances.*

The In Progress dialog box displays as the process runs.

After the process is complete, the Fund Reconciliation Report generates and prints to the destination you selected.


2000 - 2001 EDExpress for Windows - [C:\TEMP\ARTCDD.tmp]
Print...
Next Page
Prev Page
Two Page
Zoom In
Zoom Out
Close
Page 1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6

```
Report Date  05/02/2000   U.S. DEPARTMENT OF EDUCATION                PAGE   1
Report Time    08:39:43       EDEXPRESS - 2000-2001

                          FUND RECONCILIATION REPORT
   THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
********************************************************************************

  FUND    BEGINNING ADJUSTMENTS   CURRENT      FUNDS     PACKAGED      FUND
  CODE     BALANCE   TO BEG BAL   BALANCE     AWARDED     FUNDS     DIFFERENCE
-------- ---------- ----------- ----------  ----------  ----------  ----------
FWS         200,000           0    200,000           0           0           0
GRAD      1,000,000           0  1,000,000           0           0           0
HONORS    1,000,000           0    994,000       6,000       6,000           0
NEED      1,000,000           0  1,000,000           0           0           0
NO NEED   1,000,000           0  1,000,000           0           0           0
PELL     99,999,999           0 99,999,999           0           0           0
PERKINS     125,000           0    125,000           0           0           0
PLUS     99,999,999           0 99,999,999           0           0           0
SEOG        275,000           0    275,000           0           0           0
SUB      99,999,999           0 99,999,999           0           0           0
UNSUB    99,999,999           0 99,999,999           0           0           0

TOTAL   404,599,996           0 404,593,996      6,000       6,000           0
```

Apply What You Learned

In this activity you have an opportunity to practice using different methods to create Packaging records.

1. Importing ISIR Data

Based on what we covered in Lesson 1 of this unit, import all ISIR records to create student records in your Packaging database. (Refer to page E-17 if you need help.)

Use the following options:

- Select report to screen
- Select the add budget option
- Use "FS" as academic year profile
- Select all
- Note the number of records that import into your Packaging database

2. Importing External Add Data

Let's assume that your IT staff person helped you format an external file of records for students in your school's database whom you know will not file FAFSAs. This file includes AYP, budget and housing codes. Create student packaging records by importing the External Add file named **ImpExAdd.txt** into your packaging database. The file is located in the c:\iam\data directory. (Refer to page E-18 if you need help.)

- Select "All Files" as the file type
- Print the report to Screen
- Of the 17 records in the external file, note the number of records that import into your Packaging database

3. Creating a New Packaging Record by Manual Entry

You have an international student who qualifies for a music scholarship. Because this first-year, international music major will not file a FAFSA, you need to manually create a packaging record for the student. Using the information provided below (refer to Lesson 4 of this unit):

- Create a demographic record
    1. Make up a social security number and name
- Create an SAP code called IS for international students and set the no packaging flag
- Create a packaging record
    2. A/Y Profile = FS
    3. Budget Code = 1
    4. College Grade Level = 1
    5. SAP code = IS
    6. Update the EFC to 99999
    7. Although you've taken care of the required fields, you may update others according to the information about the student that you may have
    8. User Data Major = MUSIC
- Note the record's Packaging Status
- Note the record's Record Source
- Because this student does not qualify for need-based and federal aid, would you use the automatic Package feature to award this student? Why or why not?

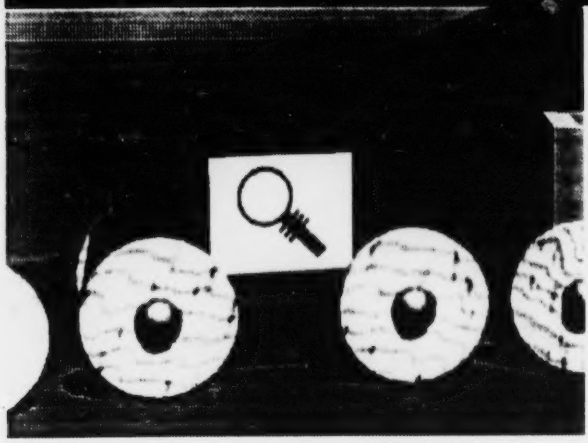
4. Modifying Existing Data

Now you will work with a record that was created by ISIR import but is not ready to be packaged. This student is a music major and qualifies for a music scholarship.

- Open record 998-20-1810
- Update the User Data to indicate that the student is a music major
- Based on the student's College Grade Level, Housing Status, and Major, update the Budget Code
- Note the record's Packaging Status

336

Unit 4



Document Tracking

This feature of EDExpress allows users to manage the request for and receipt of documents required for financial aid processing. Although Document Tracking is a Global feature, in this Unit we examine its role in the Packaging process.

Table of Contents

Lesson 1 Using Document Tracking 4-3

Lesson 2 Adding Documents to Student Records 4-6

Lesson 3 Generating and Printing Document Tracking Letters 4-26

Objectives

1. Become familiar with how Document Tracking is used before, during, and after Packaging
2. Be able to add documents to student records using manual and automated processes
3. Be able to modify, generate and print the document tracking letter

[Slide 4-2]

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Using Document Tracking

Documents

Financial aid administrators routinely request from students documents required to begin and complete the financial aid process. Depending on your school's process, you may need to track documents both before and after aid is packaged for your students. Examples of such documents include:

- Processed Student Aid Report (or ISIR)
- Institutional or other aid application
- Copy of parent's or student's federal income tax return
- Verification worksheet
- Documentation of citizenship or eligible non-citizen status

As we learned in Unit 2, Lesson 3, documents must be created in Global setup before they can be added to student records.

[Slide 4-3]

Tracking Documents

EDExpress Document Tracking allows you to:

- Identify students needing specific documents
- Add required documents to the Docs record
- Generate and print document tracking letters to request documents from students
- Update the Docs record when document tracking letters are generated
- Record receipt of documents

[Slide 4-4]

Docs (Document Tracking) Tab

To view the Document Tracking Screen

Open a student record

*Click the **Docs** tab*

The Student's Document Tracking screen displays

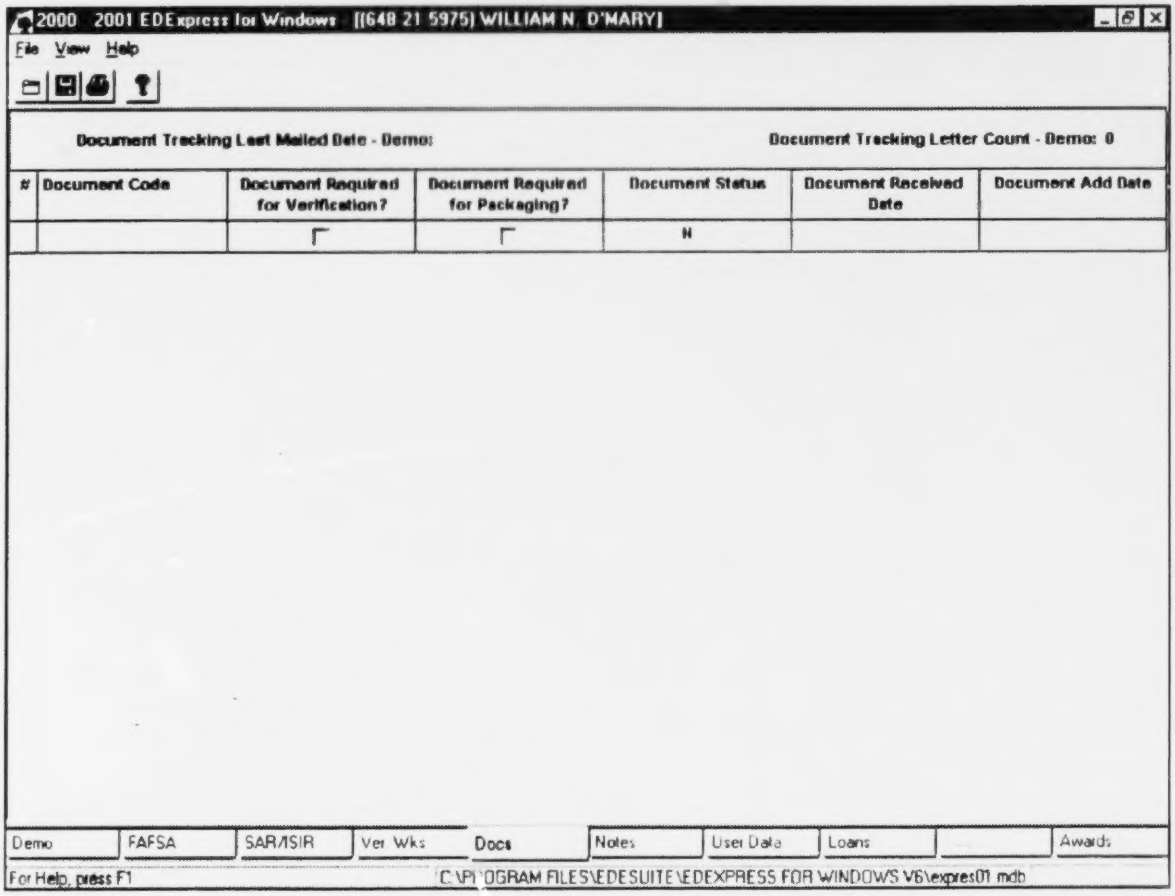
The components of the Docs tab for a student record in EDExpress include

- **Document Code**—Click the down arrow to display the list of available document codes
- **Document Required for Verification?**—This checkbox is selected if the document is required for verification

☝ ***Remember:*** *A document required for verification is added to the Docs record during the Add Documents process only if the Pell Verification Status field on the demographic record is not equal to N*

- **Document Required for Packaging?**—This checkbox is selected if the document is required for packaging. The status of any document required for packaging must be updated to R (Received) or W (Waived) before the student's record can be packaged

[Slide 4-5]


2000 2001 EDExpress for Windows [(648 21 5975) WILLIAM N. D'MARY]
File
View
Help

Document Tracking Last Mailed Date - Demo:

Document Tracking Letter Count - Demo: 0

#	Document Code	Document Required for Verification?	Document Required for Packaging?	Document Status	Document Received Date	Document Add Date
		☐	☐	N		

Demo
FAFSA
SAR/ISIR
Ver Wks
Docs
Notes
User Data
Loans
Awards
For Help, press F1

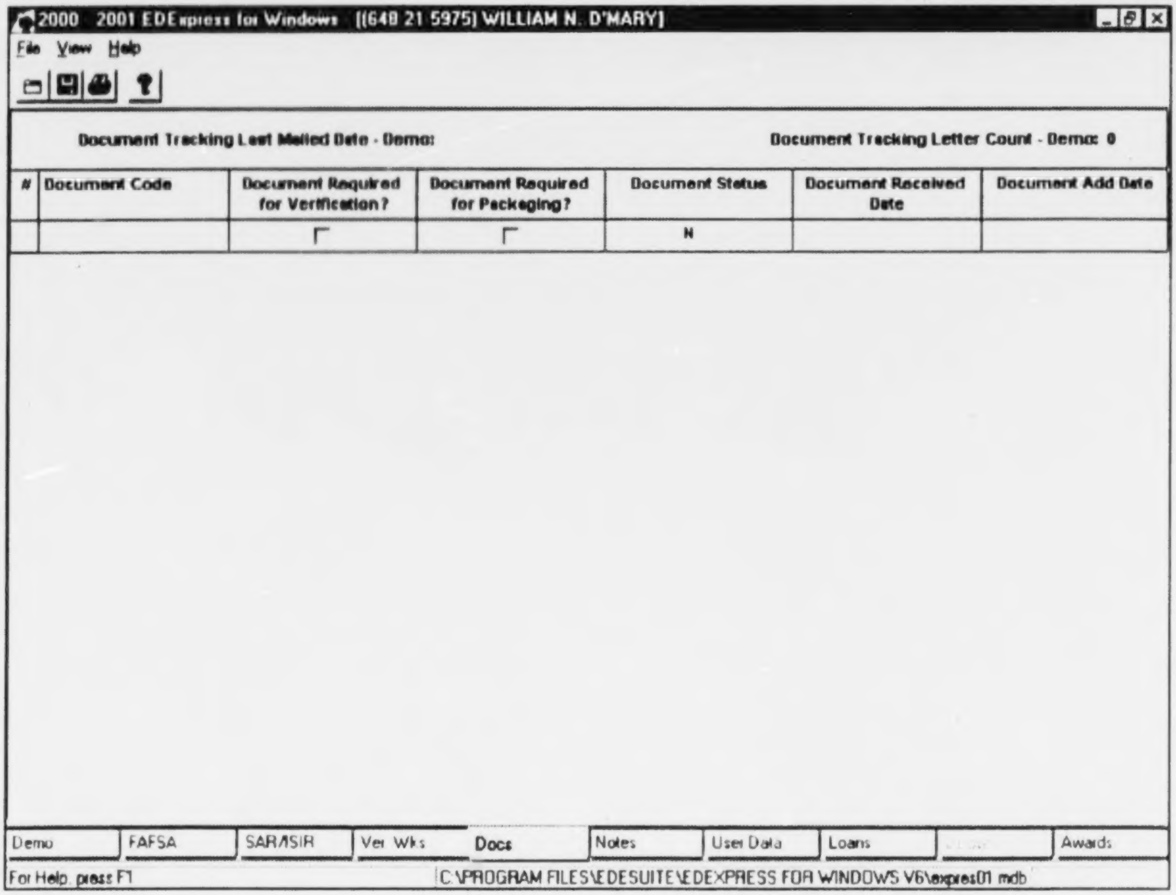
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

- Default values set for the Document Required for Verification and the Document Required for Packaging fields can be modified at the student record level
- **Document Status**—Click the down arrow to display the list of document status codes When the document status is updated to I (Incomplete), R (Received), or W (Waived), EDExpress automatically fills in the Document Receipt Date field

I	Incomplete
N	Needed
R	Received
W	Waived

- **Document Received Date**—This field displays the date the document was received in MMDDCCYY format If a number is 1 to 9, enter a zero in front of the number For example, May 28, 2000 should be entered as 05/28/2000
- **Document Add Date**—This is the date the document was added to the Document Tracking record

[Slide 4-6]


2000 2001 EDExpress for Windows [(648 21 5975) WILLIAM N. D'MARY]
File
View
Help
Demo
FAFSA
SAR/ISIR
Ver Wks
Docs
Notes
User Data
Loans
Awards

Document Tracking Last Mailed Date - Demo:

Document Tracking Letter Count - Demo: 0

#	Document Code	Document Required for Verification?	Document Required for Packaging?	Document Status	Document Received Date	Document Add Date
		☐	☐	N		

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01 mdb

Adding Documents to Student Records

You can add documents to student records in three ways

- **Process/Add Documents**—To assign documents to all student records that meet the criteria you specified for each document when you set up document tracking
- **Manual Entry**—To manually update the Docs screen of an open student record
- **Process/Multiple Entry**—To assign documents to students by entering specific Social Security Numbers or by selecting a query that identifies the student population you want

It is important to note that the system will not automatically add documents that are required for Packaging to student records having a Packaging Status of P, M, or H

[Slides 4-7 and 4-8]

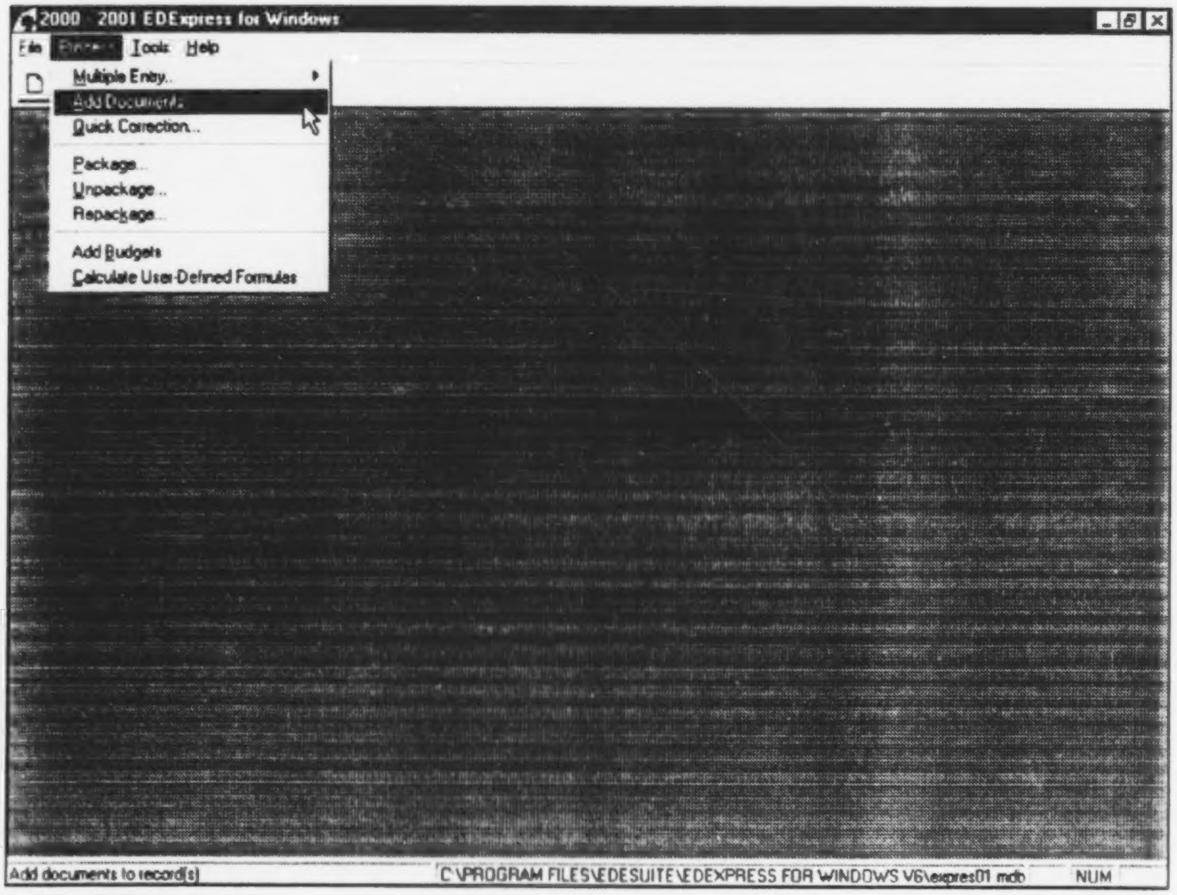
Add Documents

In this example we demonstrate the Add Documents function

To batch add documents to multiple student records

Select ***Process/Add Documents*** *from the menu bar*

The process runs immediately

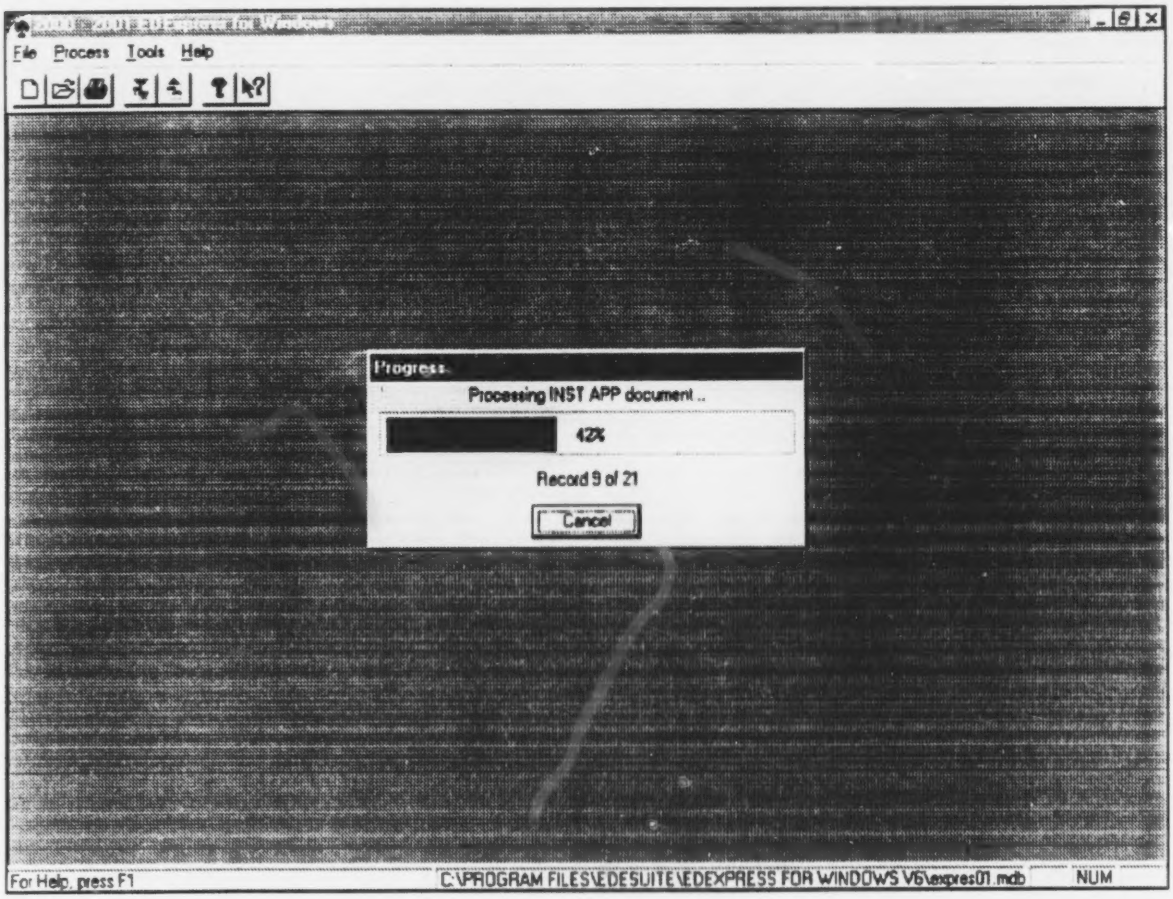

2000 2001 EDExpress for Windows
File
Process
Tools
Help
Multiple Entry..
Add Documents
Quick Correction...
Package...
Unpackage...
Repackage...
Add Budgets
Calculate User-Defined Formulas
NUM

Add documents to record(s)

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

A progress dialog box displays the number of student records to which each document is added

Remember: *The Add Documents function adds documents according to queries created using fields from the App Express database or user-defined fields created in the Global database. So, if you want the query to select records without an ISIR, your selection criteria must include a user-defined field that you populate to identify those students.*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Progress
Cancel
For Help, press F1
NUM

Processing INST APP document ..

42%

Record 9 of 21

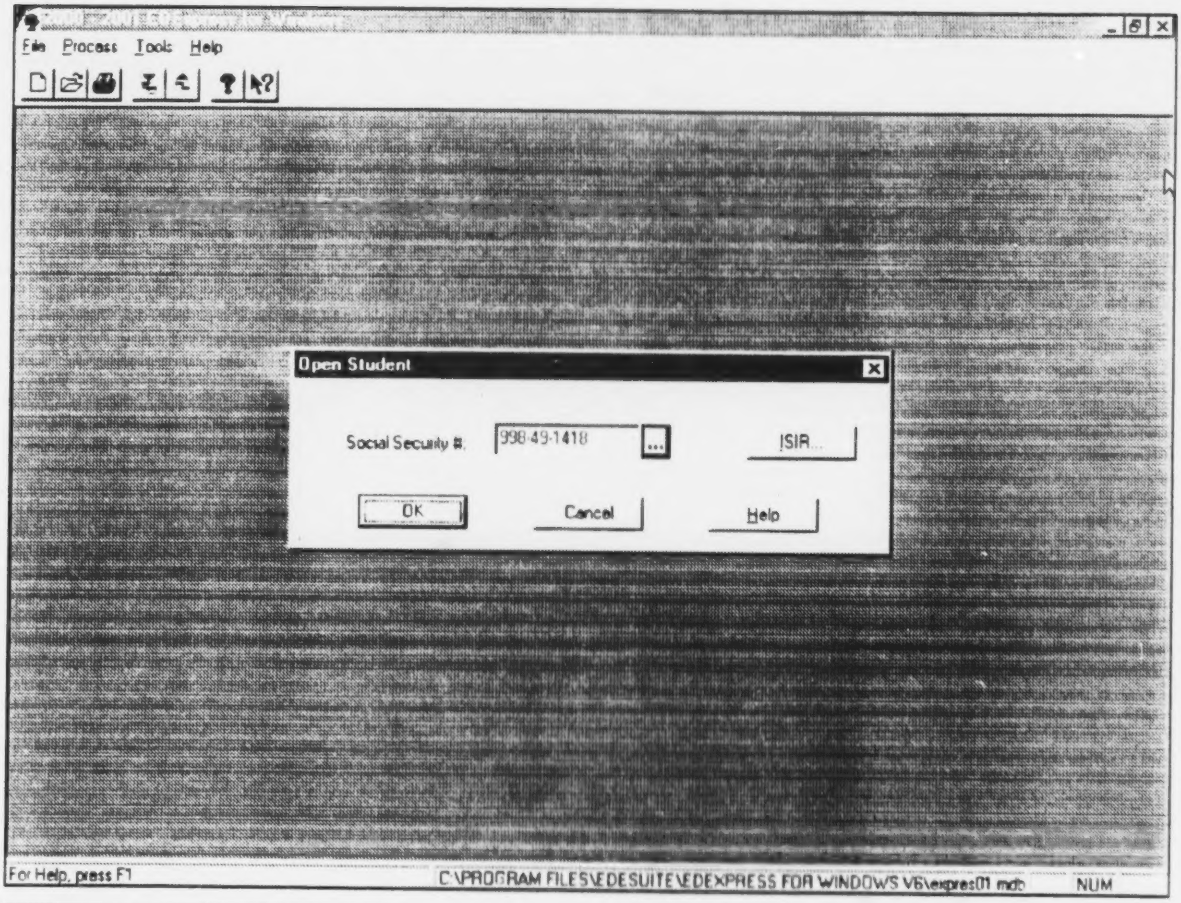
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

To see the results of the Add Documents function, open a student's record

*Click **File/Open***

Enter the student's SSN

*Click **OK***


File
Process
Tools
Help
Open Student
ISIR...
OK
Cancel
Help
NUM

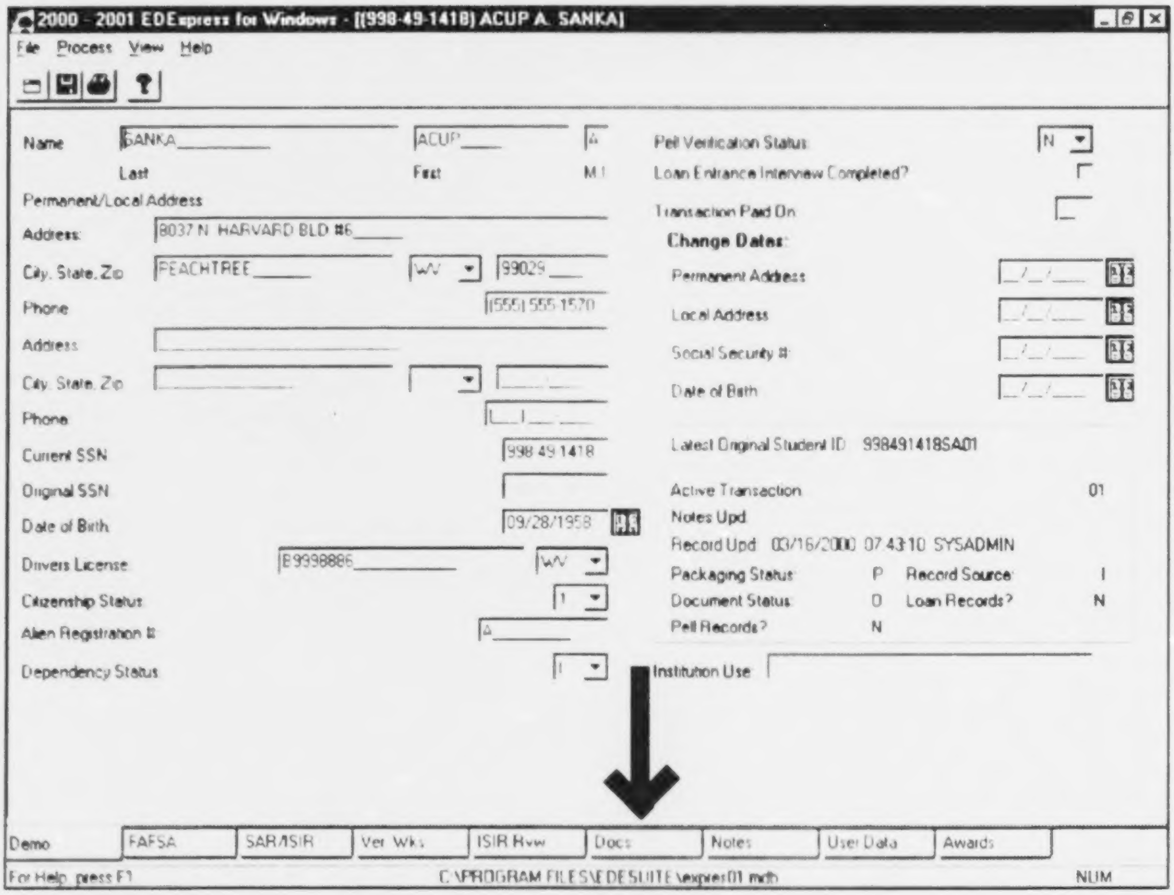
Social Security #: 998-49-1418

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

The student's demographic record displays

*Click the **Docs** tab*



2000 - 2001 EDExpress for Windows - [(998-49-1418) ACUP A. SANKA]

Name: SANKA (Last) ACUP (First) A (M.I.)

Permanent/Local Address

Address: 8037 N. HARVARD BLD #6

City, State, Zip: PEACHTREE WV 99029

Phone: (555) 555-1570

Address:

City, State, Zip:

Phone:

Current SSN: 998 49 1418

Original SSN:

Date of Birth: 09/28/1958

Drivers License: B9998886 WV

Citizenship Status: 1

Alien Registration #: A

Dependency Status: I

Pell Verification Status: N

Loan Entrance Interview Completed? ☐

Transaction Paid On:

Change Dates:

Permanent Address: _/_/__

Local Address: _/_/__

Social Security #: _/_/__

Date of Birth: _/_/__

Latest Original Student ID: 998491418SA01

Active Transaction: 01

Notes Upd:

Record Upd: 03/16/2000 07:43:10 SYSADMIN

Packaging Status: P

Record Source: I

Document Status: 0

Loan Records? N

Pell Records? N

Institution Use:

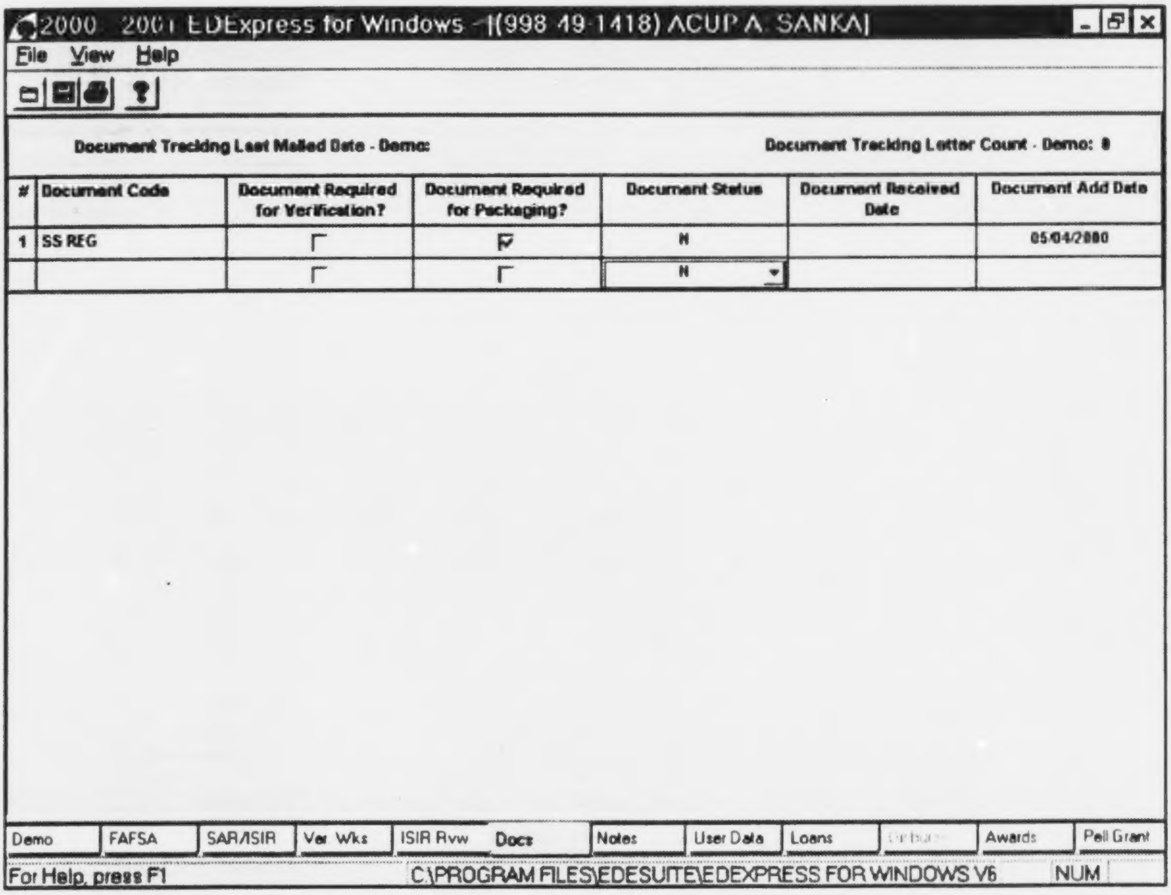
For Help, press F1 C:\PROGRAM FILES\EDESUITE\expres01.mdb NUM

The student's Document Tracking screen displays

The documents that apply to this record are displayed on the Document Tracking screen.

If a document has been added using the Add Documents process but you do not need to request it from the student, set the Document Status flag to "W" for waived. Do not delete the document, since it will be added to the record again the next time you run the Add Document process.

Tip: *If you accidentally mark a document as received and save this update, you can't change the status back to N. Instead, you must delete the document and enter it again with the correct status.*


2000 2001 EDExpress for Windows - [(998 49 1418) ACUP A. SANKA]
File
View
Help
Demo
FAFSA
SAR/ISIR
Ver. Wks
ISIR Rvw
Docs
Notes
User Data
Loans
Awards
Pell Grant
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

Document Tracking Last Mailed Date - Demo:

Document Tracking Letter Count - Demo: 0

#	Document Code	Document Required for Verification?	Document Required for Packaging?	Document Status	Document Received Date	Document Add Date
1	SS REG	☐	☑	N		05/04/2000
		☐	☐	N		

Manual Entry

To manually add documents to a student record

Open the student's record

Click the ***Docs*** *tab*

Click the ***Document Code*** *down arrow in the blank row*

Select the document code

Let's review the steps for manually entering an Institutional Application that needs to be tracked for a student record

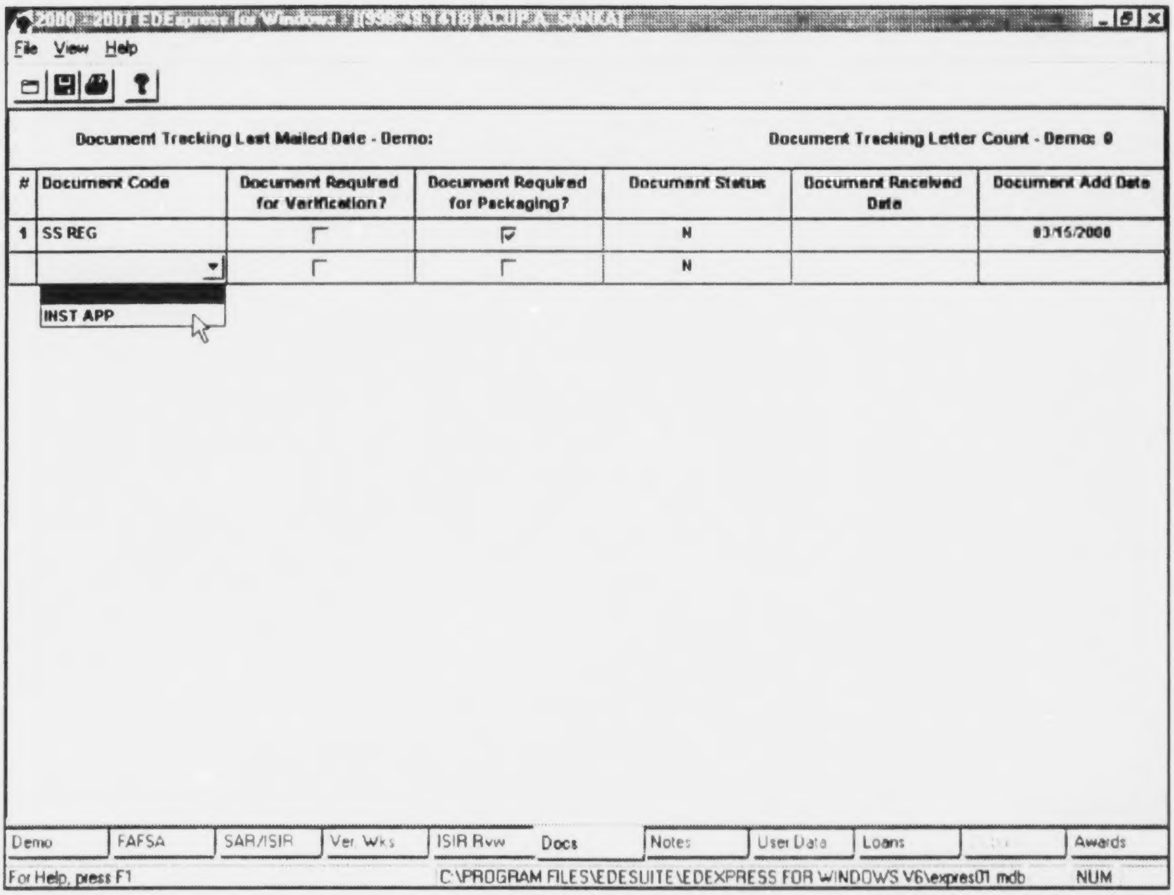
Click the down arrow in a Document Status column to review the valid codes

N = Needed

I = Incomplete

R = Received

W = Waived


2000 - 2001 EDExpress for Windows
File
View
Help
Demo
FAFSA
SAR/ISIR
Ver. Wks
ISIR Rvw
Docs
Notes
User Data
Loans
Awards
NUM

Document Tracking Last Mailed Date - Demo:

Document Tracking Letter Count - Demo: 0

#	Document Code	Document Required for Verification?	Document Required for Packaging?	Document Status	Document Received Date	Document Add Date
1	SS REG	☐	☑	N		03/15/2000
		☐	☐	N		

INST APP

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

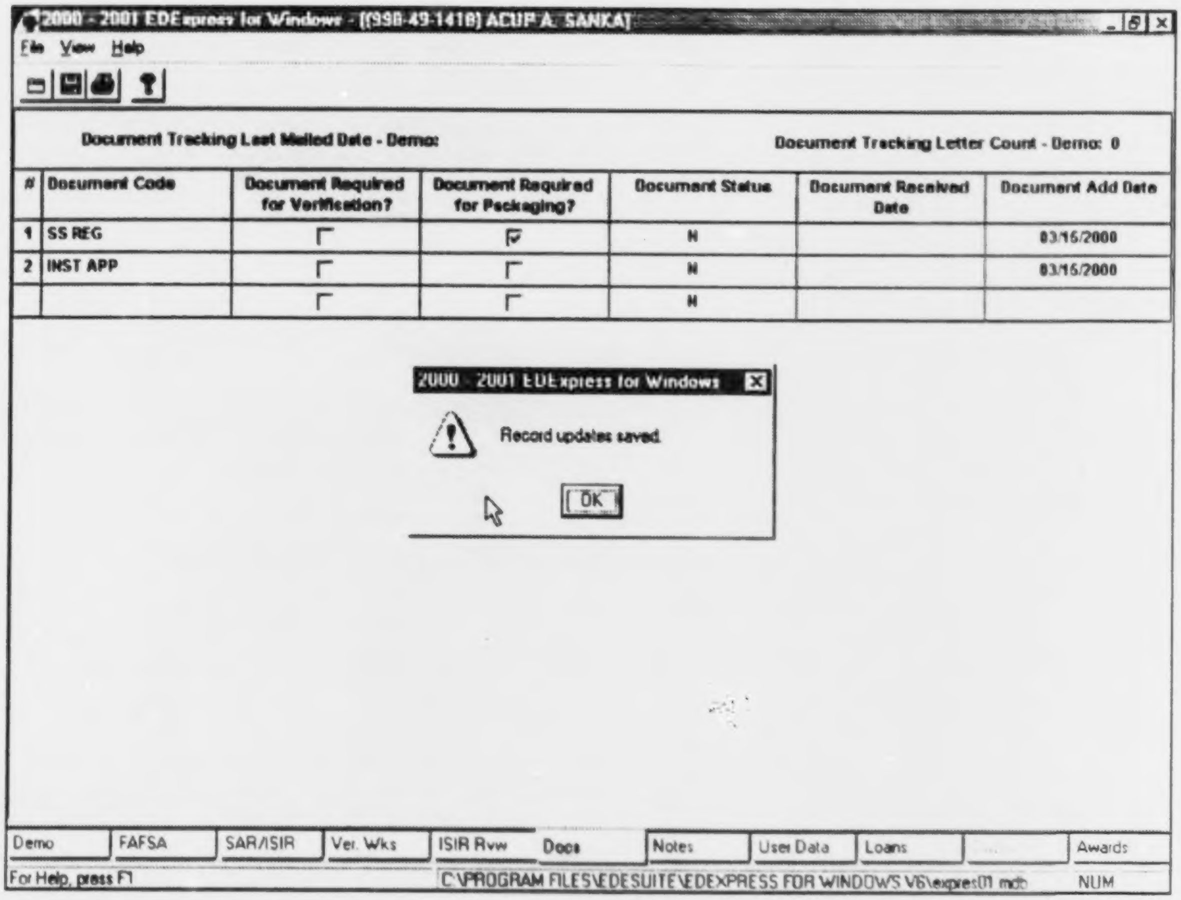
*Click the **Save** icon to save your changes to the record*

A Record Updates Pending dialog box displays

*Click **Yes***

A Record Updates Saved dialog box displays

*Click **OK***


2000 - 2001 EDExpress for Windows - [(998-49-1418) ACUP A. SANKA]
File View Help
Demo
FAFSA
SAR/ISIR
Ver. Wks
ISIR Rvw
Docs
Notes
User Data
Loans
Awards
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM
2000 - 2001 EDExpress for Windows
OK

Document Tracking Last Mailed Date - Demo:

Document Tracking Letter Count - Demo: 0

#	Document Code	Document Required for Verification?	Document Required for Packaging?	Document Status	Document Received Date	Document Add Date
1	SS REG	☐	☑	N		03/15/2000
2	INST APP	☐	☐	N		03/15/2000
		☐	☐	N		

Record updates saved.

Multiple Entry

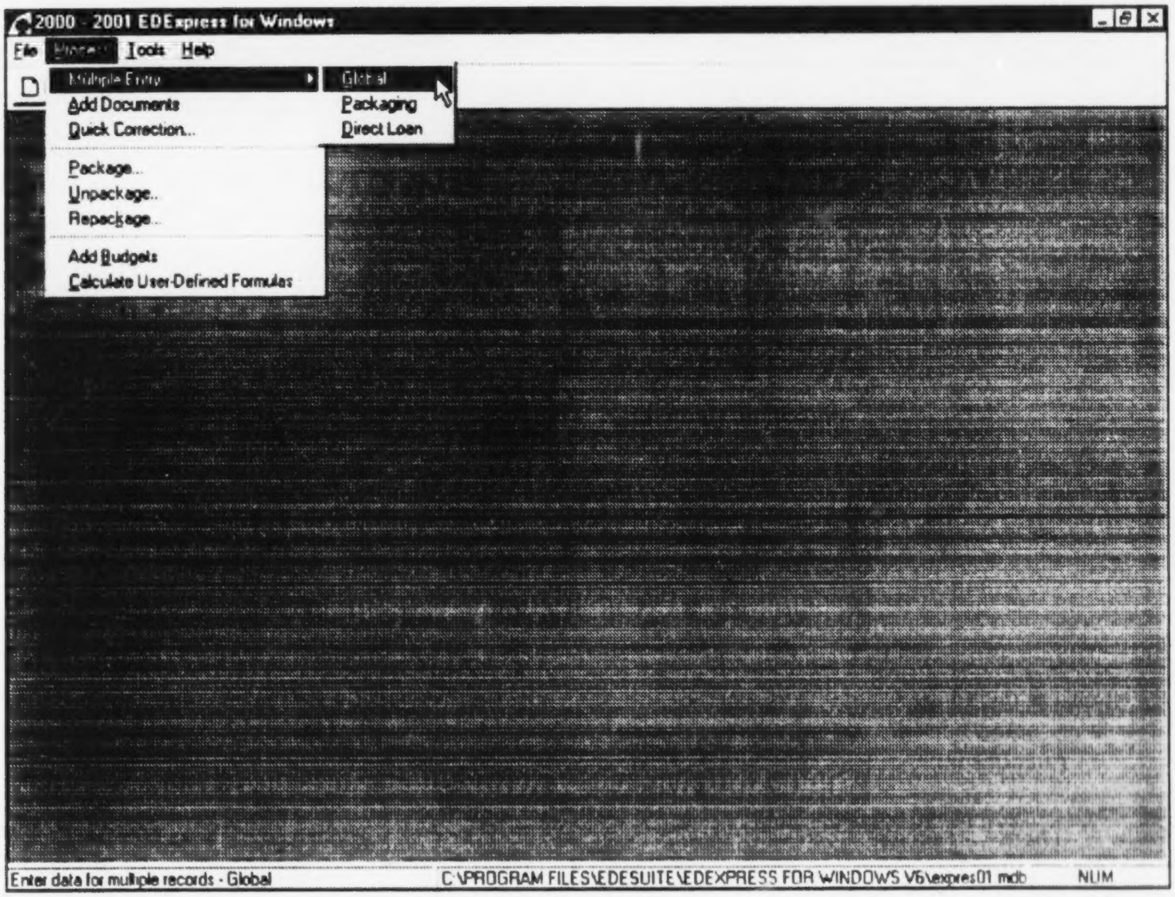
To add documents and simultaneously update other data fields

Select ***Process/ Multiple Entry/Global*** *from the menu bar.*

Another method of batch adding documents to multiple student records is the Multiple Entry function. Using the Multiple Entry function, you can add information or update various fields in document tracking (and other databases) for multiple records at one time.

In this example, we add an institutional application to records and indicate for each record that the document was received.

Tip: You can also update any user-defined fields you created in User Data.


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Multiple Entry
Add Documents
Quick Correction...
Package...
Unpackage...
Repackage...
Add Budgets
Calculate User-Defined Formulas
Global
Packaging
Direct Loan
NUM

Enter data for multiple records - Global

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

*Click the **Select** checkbox for each field to update on all the records*

The Global Multiple Entry dialog box displays

Select the appropriate values

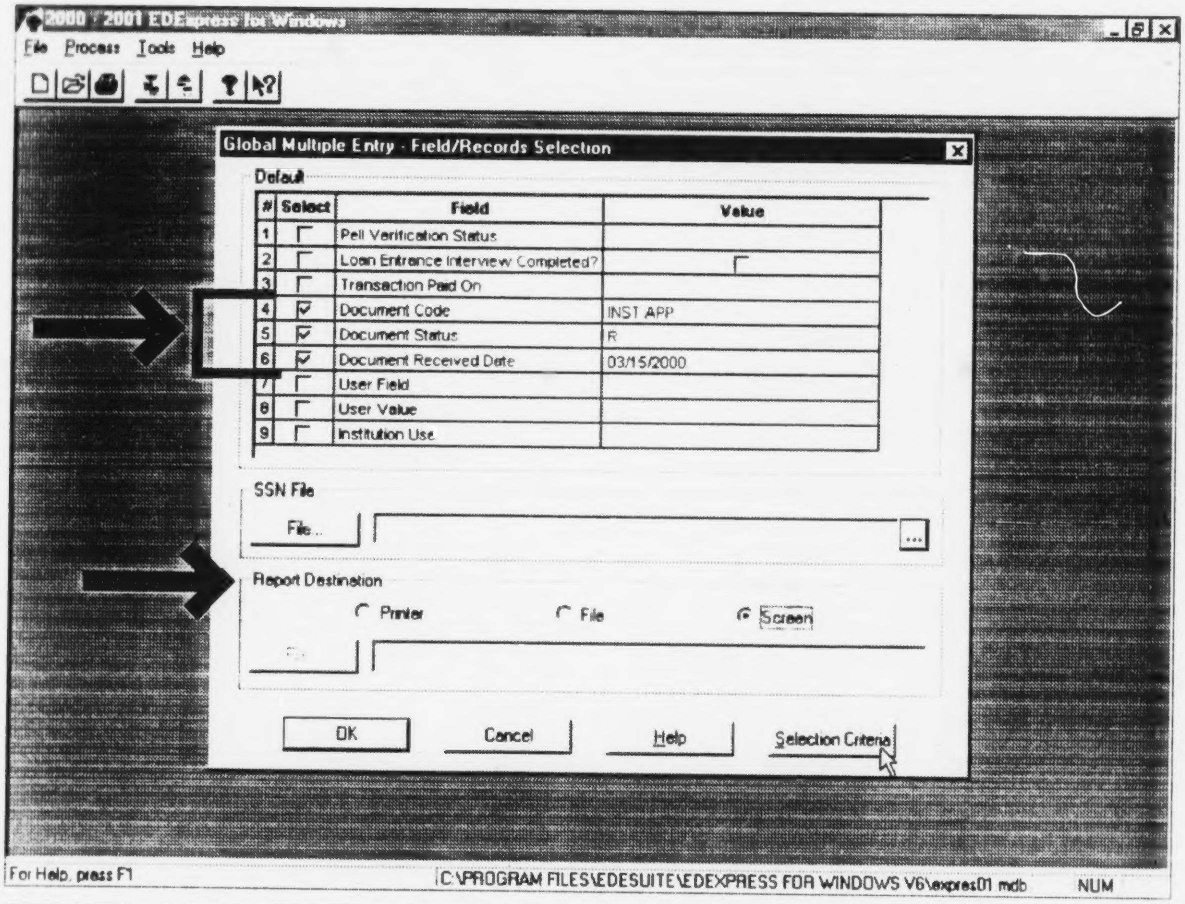
Document Code from the drop-down list

Document Status from the drop-down list

Document Received Date - System date automatically defaults

Report Destination

Note: After the process runs, a summary edit report generates


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Global Multiple Entry - Field/Records Selection
Default
SSN File
File...
OK
Cancel
Help
Selection Criteria

#	Select	Field	Value
1	☐	Pell Verification Status	
2	☐	Loan Entrance Interview Completed?	☐
3	☐	Transaction Paid On	
4	☑	Document Code	INST APP
5	☑	Document Status	R
6	☑	Document Received Date	03/15/2000
7	☐	User Field	
8	☐	User Value	
9	☐	Institution Use	

Report Destination

○ Printer ○ File ● Screen

For Help, press F1

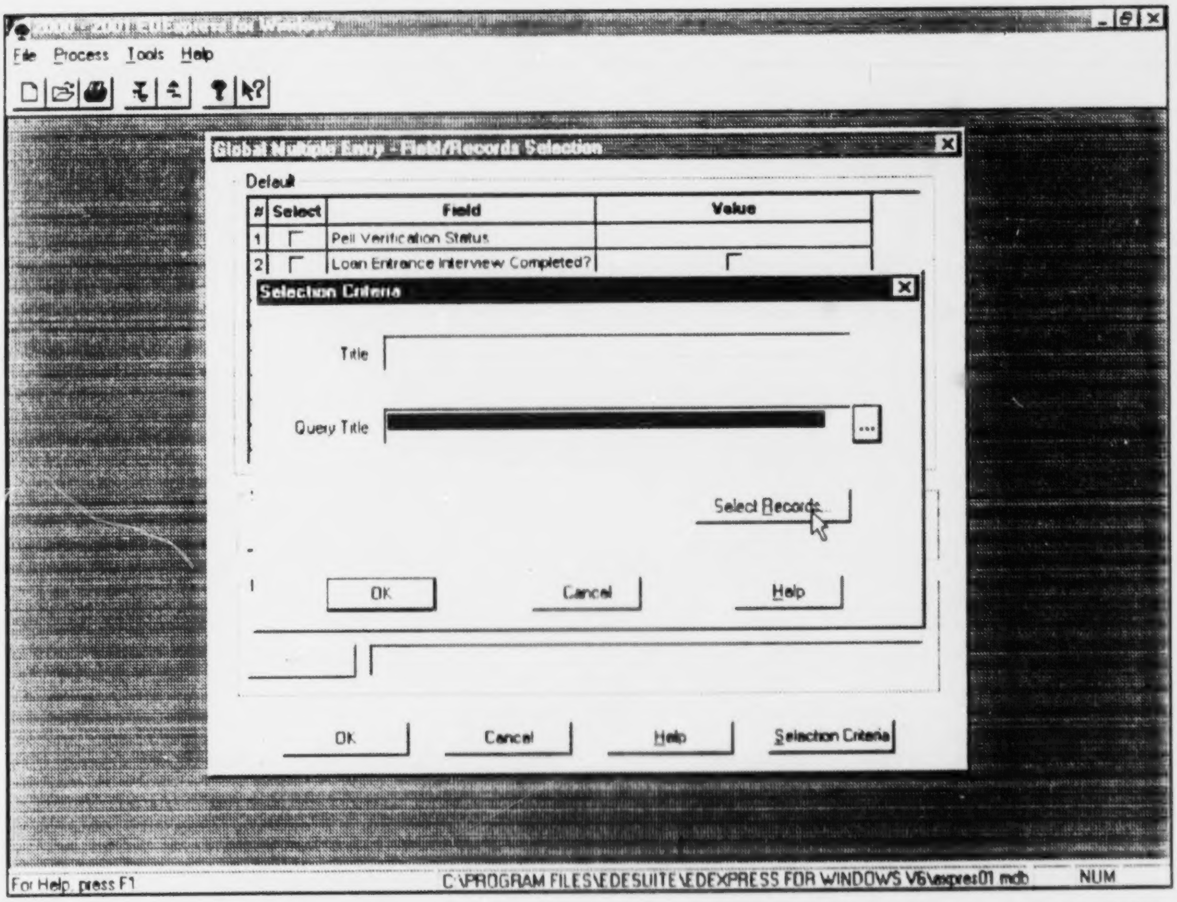
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb NUM

*Click the **Select Criteria** button*

The Selection Criteria dialog box displays

*Click the **Select Records** button*

Remember: *The Multiple Entry function adds documents according to queries created in the Global databse*



File Process Tools Help
Global Multiple Entry - Field/Records Selection
Default
Selection Criteria
Title
Query Title
Select Records...
OK
Cancel
Help
OK
Cancel
Help
Selection Criteria
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

#	Select	Field	Value
1	☐	Pell Verification Status	
2	☐	Loan Entrance Interview Completed?	☐

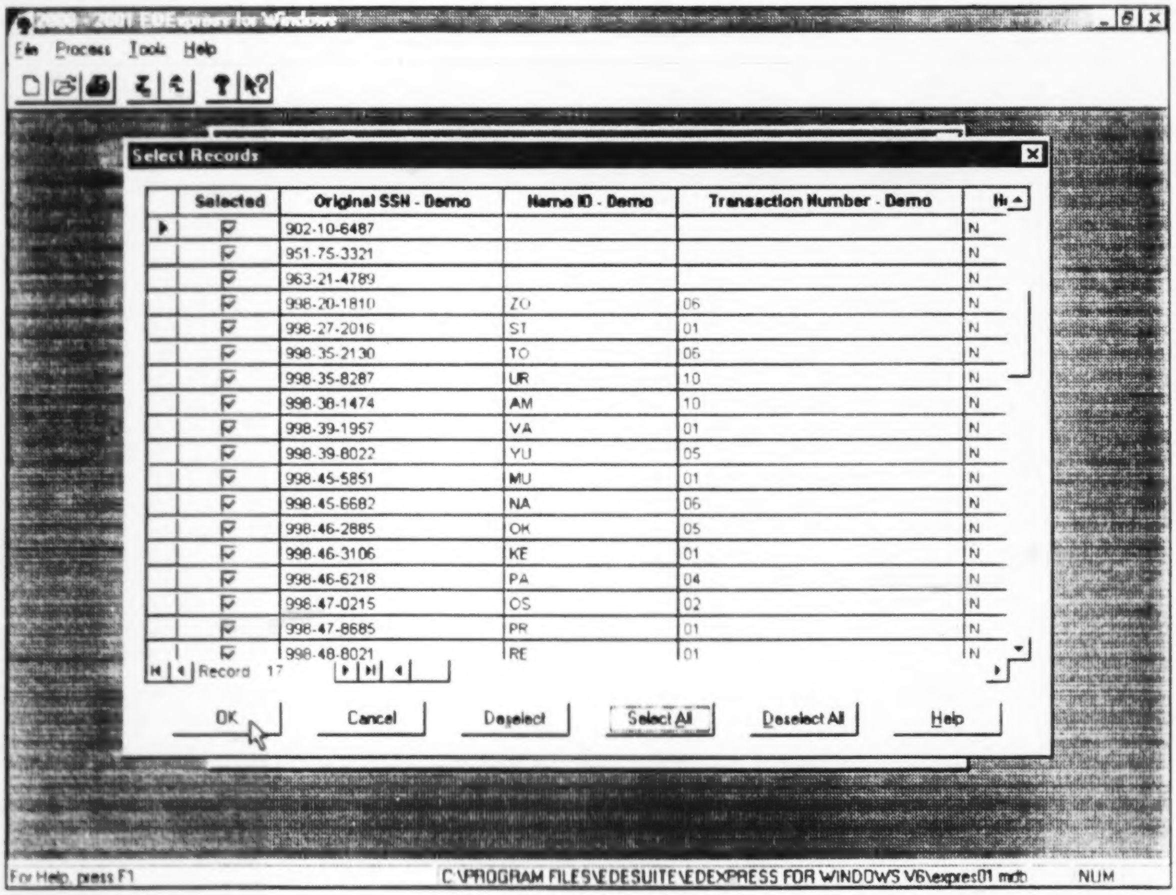
The Select Records dialog box displays

*Click the **Selected** checkboxes to indicate the records you want to update*

*Click **OK***

The Global Multiple Entry dialog box displays again

*Click **OK***


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Select Records
Record 17
OK
Cancel
Deselect
Select All
Deselect All
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

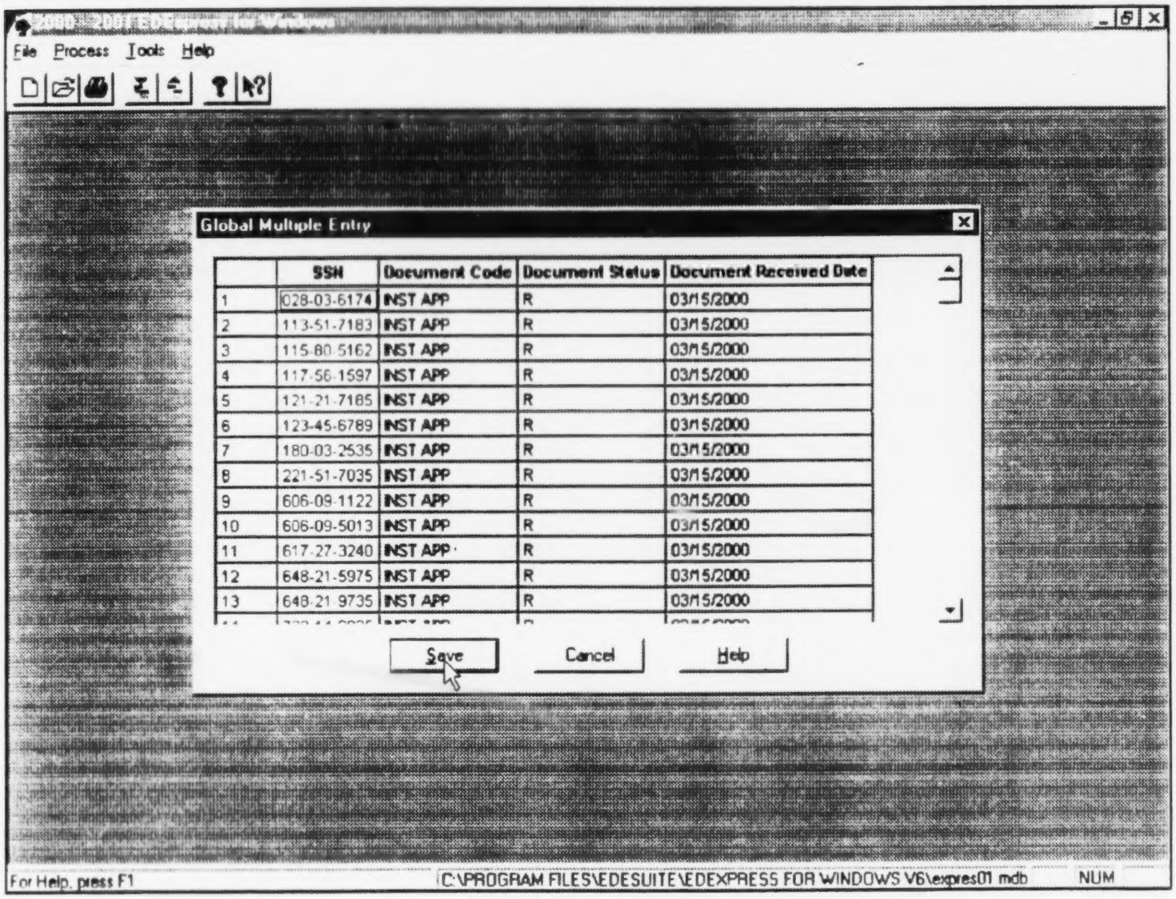
	Selected	Original SSN - Demo	Name ID - Demo	Transaction Number - Demo	H
▶	☑	902-10-6487			N
	☑	951-75-3321			N
	☑	963-21-4789			N
	☑	998-20-1810	ZO	06	N
	☑	998-27-2016	ST	01	N
	☑	998-35-2130	TO	06	N
	☑	998-35-8287	UR	10	N
	☑	998-38-1474	AM	10	N
	☑	998-39-1957	VA	01	N
	☑	998-39-8022	YU	05	N
	☑	998-45-5851	MU	01	N
	☑	998-45-6682	NA	06	N
	☑	998-46-2885	OK	05	N
	☑	998-46-3106	KE	01	N
	☑	998-46-6218	PA	04	N
	☑	998-47-0215	OS	02	N
	☑	998-47-8685	PR	01	N
	☑	998-48-8021	RE	01	N

A list of the files you selected displays

Click ***Save***

A Records Updates Pending dialog box displays

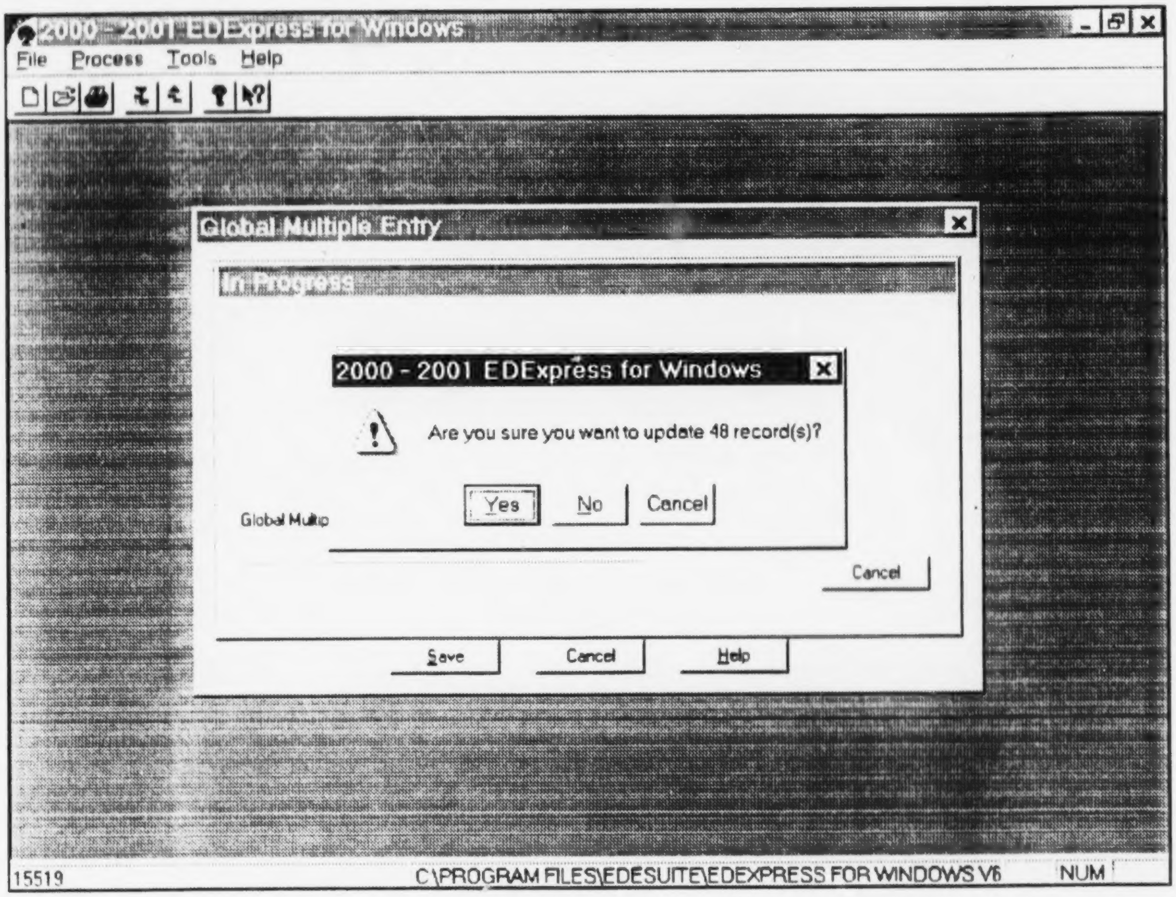
Click ***Yes*** *to continue*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Global Multiple Entry
Save
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

	SSN	Document Code	Document Status	Document Received Date
1	028-03-6174	INST APP	R	03/15/2000
2	113-51-7183	INST APP	R	03/15/2000
3	115-80-5162	INST APP	R	03/15/2000
4	117-56-1597	INST APP	R	03/15/2000
5	121-21-7185	INST APP	R	03/15/2000
6	123-45-6789	INST APP	R	03/15/2000
7	180-03-2535	INST APP	R	03/15/2000
8	221-51-7035	INST APP	R	03/15/2000
9	606-09-1122	INST APP	R	03/15/2000
10	606-09-5013	INST APP	R	03/15/2000
11	617-27-3240	INST APP	R	03/15/2000
12	648-21-5975	INST APP	R	03/15/2000
13	648-21-9735	INST APP	R	03/15/2000

A second dialog box displays and asks you to verify the update for the number of records selected

Click ***Yes*** *to update the records*



2000 - 2001 EDExpress for Windows
File Process Tools Help
Global Multiple Entry
In Progress
2000 - 2001 EDExpress for Windows

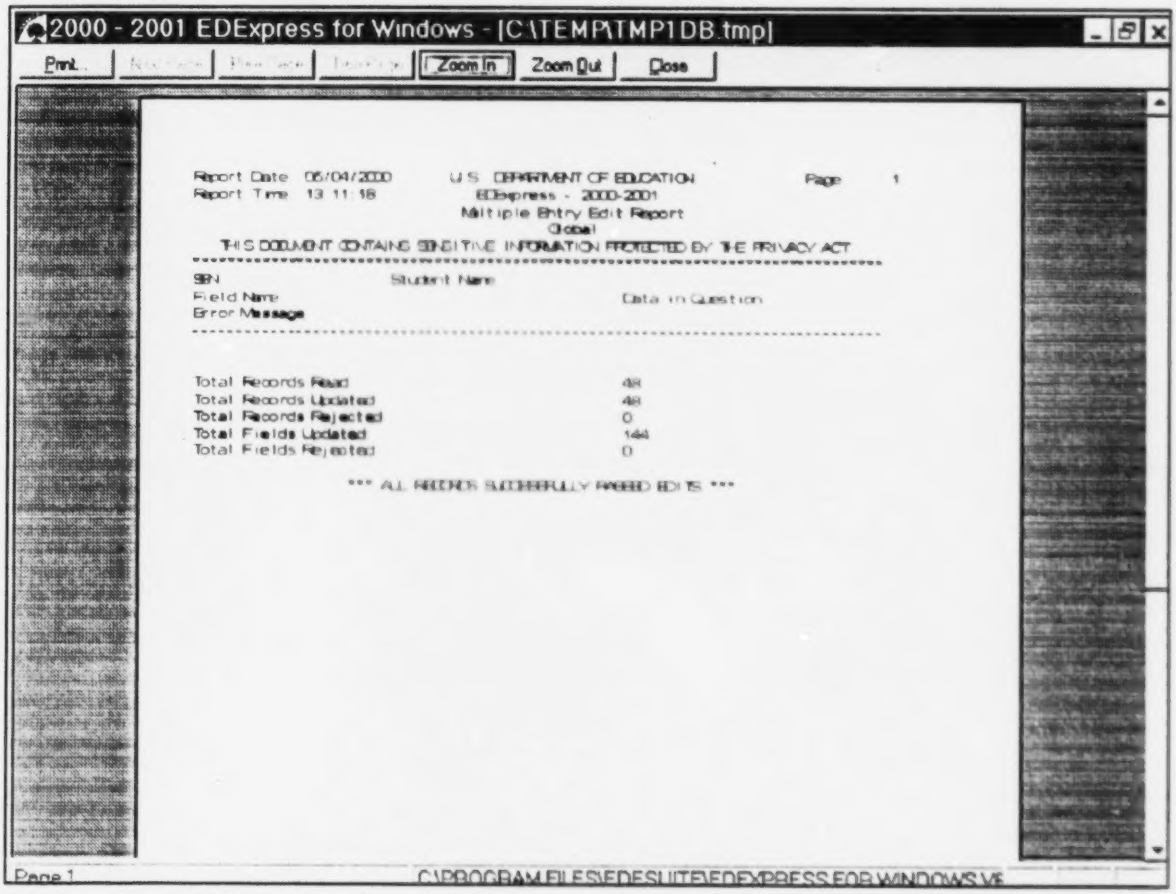
Are you sure you want to update 48 record(s)?

Yes
No
Cancel
Global Multip
Cancel
Save
Cancel
Help
15519
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

When the system has updated the records, the edit report prints to the screen (or destination you selected).

After you review the report, click the ***Close*** *button.*

The Multiple Entry Edit Report shows that all 84 records in this example were updated along with the total number of fields updated.


2000 - 2001 EDExpress for Windows - [C:\TEMP\TMP1DB.tmp]
Print...
Zoom In
Zoom Out
Close
Page 1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS VE

```
Report Date  06/04/2000       U.S. DEPARTMENT OF EDUCATION          Page    1
Report Time  13:11:18           EDExpress - 2000-2001
                              Multiple Entry Edit Report
                                        Global
   THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
------------------------------------------------------------------------------
SSN                     Student Name
Field Name                                        Data in Question
Error Message
------------------------------------------------------------------------------


Total Records Read                                48
Total Records Updated                             48
Total Records Rejected                            0
Total Fields Updated                              144
Total Fields Rejected                             0

            *** ALL RECORDS SUCCESSFULLY PASSED EDITS ***
```

Apply What You Learned

In this exercise, you practice creating documents and queries in the software and using the Add Documents batch function

1. Referring to the four completed Document Tracking Worksheets provided on the following pages, verify that each query listed has been created in the software If needed, refer to the query worksheet(s) you completed in the Apply What You Learned exercise from Unit 2, Lesson 3, page 2-50

2. Again referring to the completed Document Tracking Worksheets, create the verification documents in the software (If needed, refer to page E-8 for the steps to set up Document Tracking)

3. Use the Add Documents batch function to add these four verification documents to student records

Document Tracking Worksheet

1. **Document Code:** This code displays on reports and on the Document Tracking tab of the student's record (10-character alphanumeric).

Document Code: PAR TAX

2. **Year:** Enter the year(s), if applicable, that applies to the document begin requested. This prints on reports and on the Document Tracking tab of the student's record (9-character alphanumeric).

Year: 2000-2001

3. **Description:** Enter a free-form description of the document. The description prints on the Document Tracking letter as the item being requested (50-character alphanumeric).

Description: Signed Copy of Parent's 1999 Federal Tax Return

4. **Criteria:** Enter title of query that selects student records that the document tracking code is assigned.

Criteria: Selected for Verification - Dependant

5. **Automatic Request?** Do you want this document to be added automatically to student records when the Add Documents function is performed?

Automatic Request? Yes ☐ No ☒

6. **Required for Packaging?** Is this document required before your office packages financial aid for students to which the document is assigned?

Required for Packaging? Yes ☐ No ☒

7. **Required for Verification?** Is this document being requested of all students who have been selected for verification by CPS?

Required for Verification? Yes ☒ No ☐

8. **Comments:** This document should be assigned to those student records having one or more of the following ISIR comment codes:

Document Tracking Worksheet

1. **Document Code:** This code displays on reports and on the Document Tracking tab of the student's record (10-character alphanumeric).

Document Code: DEP VW

2. **Year:** Enter the year(s), if applicable, that applies to the document begin requested. This prints on reports and on the Document Tracking tab of the student's record (9-character alphanumeric).

Year: 2000-2001

3. **Description:** Enter a free-form description of the document. The description prints on the Document Tracking letter as the item being requested (50-character alphanumeric).

Description: 2000-2001 Dependent Verification Worksheet

4. **Criteria:** Enter title of query that selects student records that the document tracking code is assigned.

Criteria: Selected for Verification - Dependent

5. **Automatic Request?** Do you want this document to be added automatically to student records when the Add Documents function is performed?

Automatic Request? Yes ☐ No ☒

6. **Required for Packaging?** Is this document required before your office packages financial aid for students to which the document is assigned?

Required for Packaging? Yes ☐ No ☒

7. **Required for Verification?** Is this document being requested of all students who have been selected for verification by CPS?

Required for Verification? Yes ☒ No ☐

8. **Comments:** This document should be assigned to those student records having one or more of the following ISIR comment codes:

☐ ☐ ☐ ☐ ☐ ☐

Document Tracking Worksheet

1. **Document Code:** This code displays on reports and on the Document Tracking tab of the student's record (10-character alphanumeric).

Document Code: INDEP VW

2. **Year:** Enter the year(s), if applicable, that applies to the document begin requested. This prints on reports and on the Document Tracking tab of the student's record (9-character alphanumeric).

Year: 2000-2001

3. **Description:** Enter a free-form description of the document. The description prints on the Document Tracking letter as the item being requested (50-character alphanumeric).

Description: 2000-2001 Independent Verification Worksheet

4. **Criteria:** Enter title of query that selects student records that the document tracking code is assigned.

Criteria: Selected for Verification - Independent

5. **Automatic Request?** Do you want this document to be added automatically to student records when the Add Documents function is performed?

Automatic Request? Yes ☐ No ☒

6. **Required for Packaging?** Is this document required before your office packages financial aid for students to which the document is assigned?

Required for Packaging? Yes ☐ No ☒

7. **Required for Verification?** Is this document being requested of all students who have been selected for verification by CPS?

Required for Verification? Yes ☒ No ☐

8. **Comments:** This document should be assigned to those student records having one or more of the following ISIR comment codes:

Document Tracking Worksheet

1. **Document Code:** This code displays on reports and on the Document Tracking tab of the student's record (10-character alphanumeric).

Document Code: STU TAX

2. **Year:** Enter the year(s), if applicable, that applies to the document begin requested. This prints on reports and on the Document Tracking tab of the student's record (9-character alphanumeric).

Year: 2000-2001

3. **Description:** Enter a free-form description of the document. The description prints on the Document Tracking letter as the item being requested (50-character alphanumeric).

Description: Signed Copy of Student's 1999 Federal Income Tax Return

4. **Criteria:** Enter title of query that selects student records that the document tracking code is assigned.

Criteria:

5. **Automatic Request?** Do you want this document to be added automatically to student records when the Add Documents function is performed?

Automatic Request? Yes ☐ No ☒

6. **Required for Packaging?** Is this document required before your office packages financial aid for students to which the document is assigned?

Required for Packaging? Yes ☐ No ☒

7. **Required for Verification?** Is this document being requested of all students who have been selected for verification by CPS?

Required for Verification? Yes ☒ No ☐

8. **Comments:** This document should be assigned to those student records having one or more of the following ISIR comment codes:

☐ ☐ ☐ ☐ ☐ ☐

Generating and Printing Document Tracking Letters

Once documents are added to student records, you are ready to generate and print Document Tracking letters. EDExpress gives you several options to batch generate document tracking letters.

- **Sort Order**—Allows you to sort the batch by Social Security Number or last name
- **Document Add Date**—Optional field allows to you generate letters based on the date documents were added to student records
- **Address**—Allows you to select which address—local or permanent—to print on the letter
- **Exclude Heading from Letter?**—Excludes the letter name and academic year, which print centered at the top of page
- **Print User Defined Text?**—Includes the additional text you created in the Global System Setup up as the first section or block of the document tracking letter text
- **Exclude Signature?**—Allows you to exclude the system-defined closing at the bottom of the letter (i.e., Sincerely, Financial Aid Administrator)

It's very important to remember that when you print Document Tracking letters to either the printer or a file, the Document Tracking Letter Last Mailed Date field on the Docs tab updates. Once the field updates, you can't generate another letter for this student until the number of days you indicated in the Global System Setup elapses.

It's a good idea to first generate the letters to print to screen. Printing to screen allows you to view and verify the results. Then, repeat the process, but this time generate and actually print the letters to a file or printer.

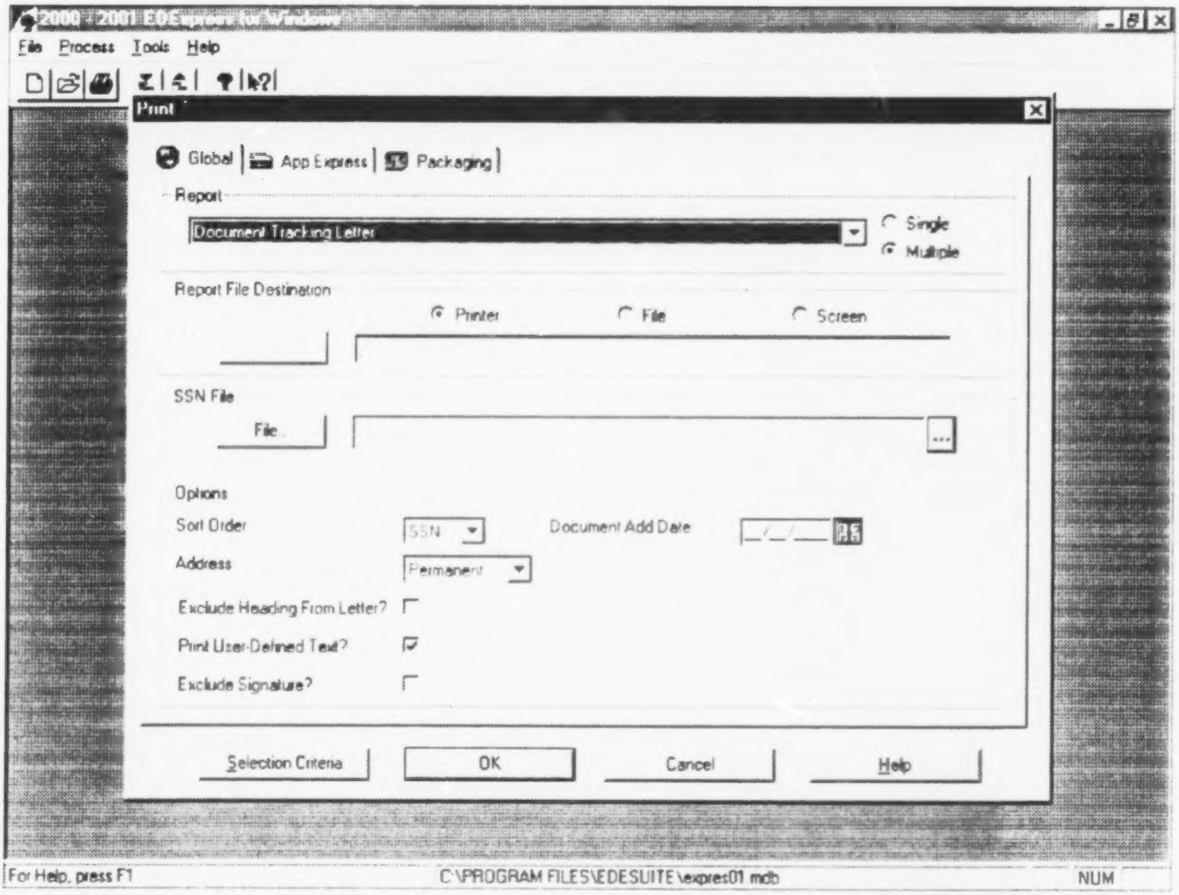
[Slide 4-10 and 4-11]

To generate Document Tracking letters

*Select **File/Print** on the main menu bar*

*Click the **Global** tab*

*Under Report, select **Document Tracking Letter***


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Print
Global
App Express
Packaging
Selection Criteria
OK
Cancel
Help
File...
For Help, press F1
NUM

Report: Document Tracking Letter
○ Single
● Multiple

Report File Destination
● Printer
○ File
○ Screen

SSN File

Options
Sort Order: SSN
Document Add Date: __/__/____
Address: Permanent
Exclude Heading From Letter? ☐
Print User-Defined Text? ☑
Exclude Signature? ☐

C:\PROGRAM FILES\EDESUITE\expres01.mdb

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*Click **Multiple** to print letters for more than one student*

Skip the Document Add Date option

*Click **Screen** as the Report File Destination to view the letters on screen*

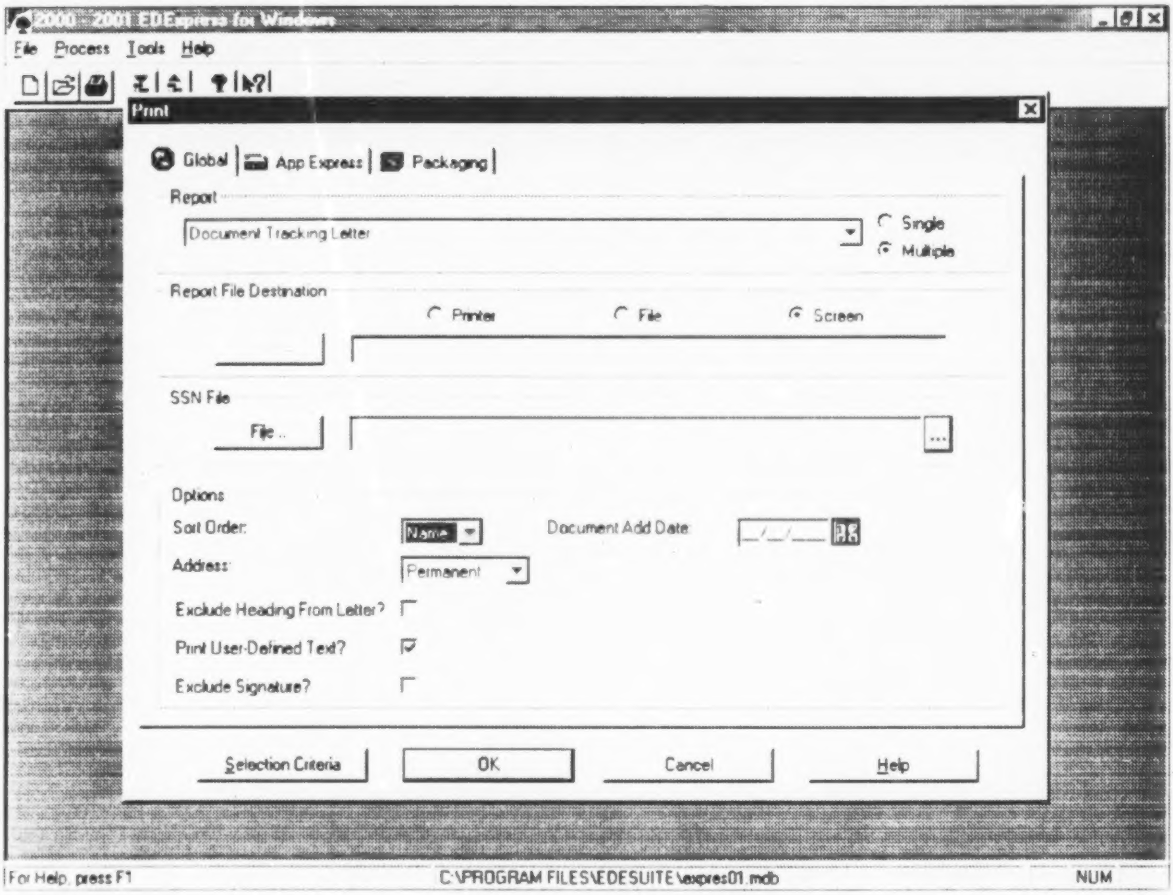
*Click the **Sort Order** down arrow and select **Name** to sort by last name*

*Click the **Print User-Defined Text?** checkbox to include the user-defined text created when you set up the Document Tracking letter*

Skip Exclude Signature? checkbox

*Click **OK***

***Note:** If you want to generate Document Tracking letters according to the date documents were added, enter the appropriate date value in the Document Add Date field*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Print
Global
App Express
Packaging
Selection Criteria
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\expres01.mdb
NUM

Report: Document Tracking Letter
○ Single
● Multiple

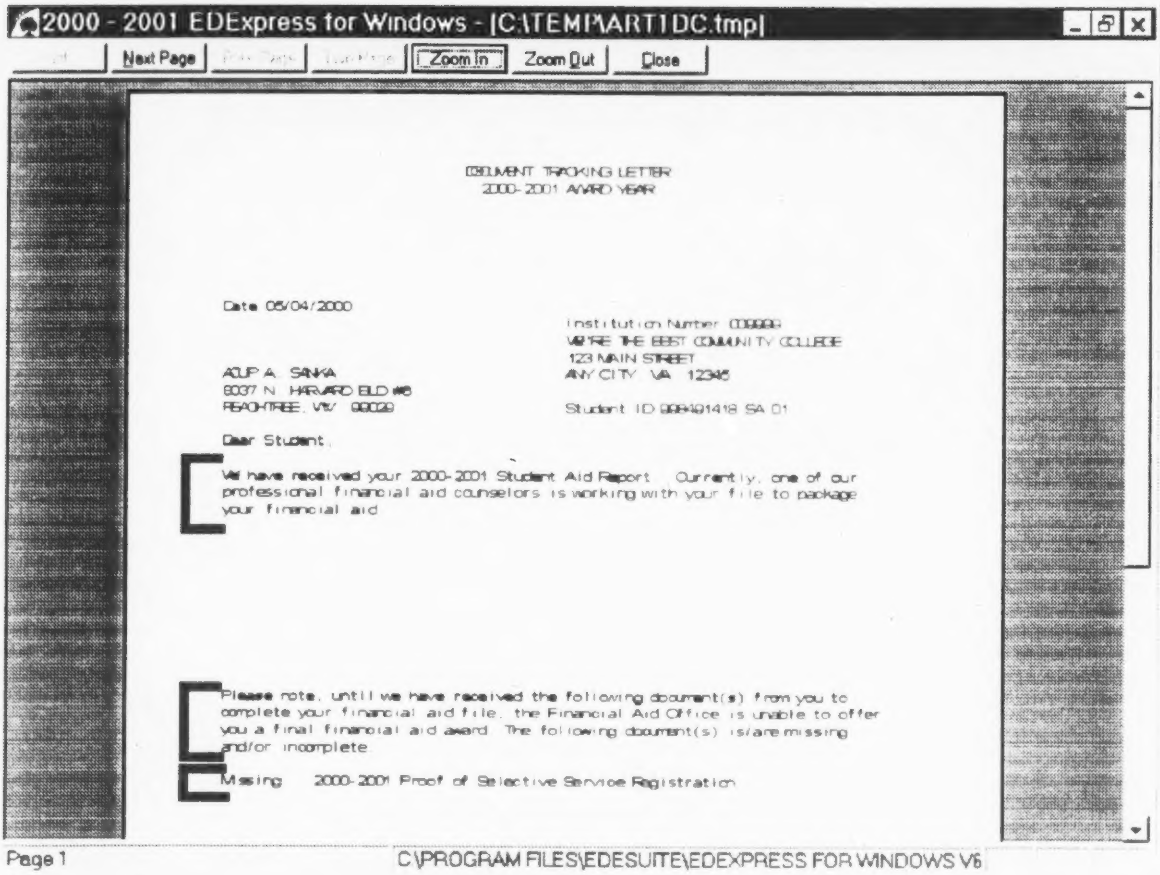
Report File Destination
○ Printer
○ File
● Screen

SSN File: File...

Options
Sort Order: Name
Document Add Date: __/__/____
Address: Permanent
Exclude Heading From Letter? ☐
Print User-Defined Text? ☑
Exclude Signature? ☐

The Document Tracking letter is divided into three parts. The first part includes any user-defined text you created. The second part includes EDExpress predefined text. The third part lists the documents that are missing.

*Click **Close** when you finish viewing the letter*


2000 - 2001 EDExpress for Windows - [C:\TEMP\ART1DC.tmp]
Next Page
Zoom In
Zoom Out
Close
Page 1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6

DOCUMENT TRACKING LETTER
2000-2001 AWARD YEAR

Date 05/04/2000

Institution Number 009999
WE'RE THE BEST COMMUNITY COLLEGE
123 MAIN STREET
ANY CITY VA 12345

ADUP A. SANKA
8037 N. HARVARD BLD #6
PEACHTREE, VW 99029

Student ID 999491418 SA 01

Dear Student,

We have received your 2000-2001 Student Aid Report. Currently, one of our professional financial aid counselors is working with your file to package your financial aid.

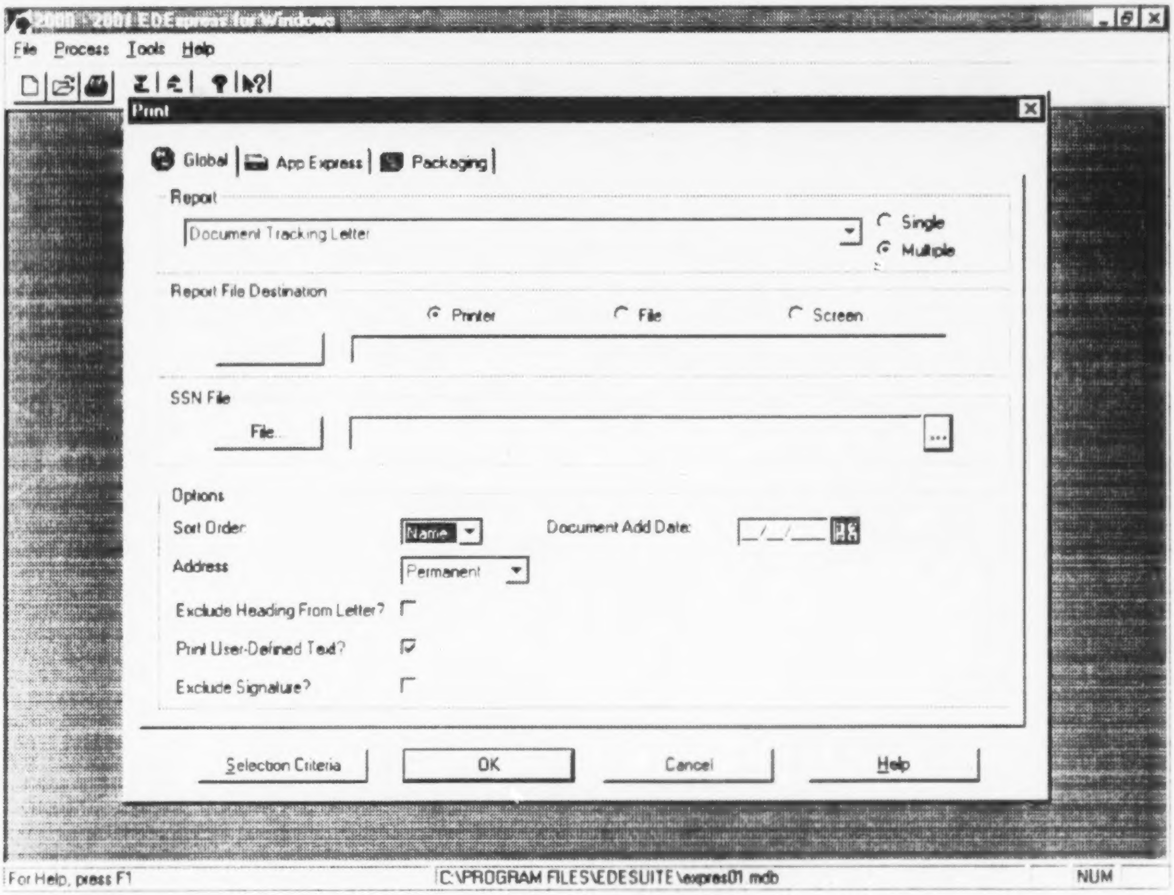
Please note, until we have received the following document(s) from you to complete your financial aid file, the Financial Aid Office is unable to offer you a final financial aid award. The following document(s) is/are missing and/or incomplete.

Missing 2000-2001 Proof of Selective Service Registration

Repeat the process

Select **Printer** *or* **File** *as the Report Type Destination*

Remember: *If you add documents to student records in error, you can use the EDExpress Utilities function to clear the entire Document Tracking Student Database. However, clearing this database does not also clear dates from the Document Tracking Letter Last Mailed Date field.*


2000 - 2001 EDExpress for Windows
File Process Tools Help
Print
Global
App Express
Packaging
Selection Criteria
OK
Cancel
Help

Report: Document Tracking Letter ○ Single ● Multiple

Report File Destination: ● Printer ○ File ○ Screen

SSN File: File...

Options

Sort Order: Name

Document Add Date: __/__/____

Address: Permanent

Exclude Heading From Letter? ☐

Print User-Defined Text? ☑

Exclude Signature? ☐

For Help, press F1

C:\PROGRAM FILES\EDESUITE\expres01.mdb

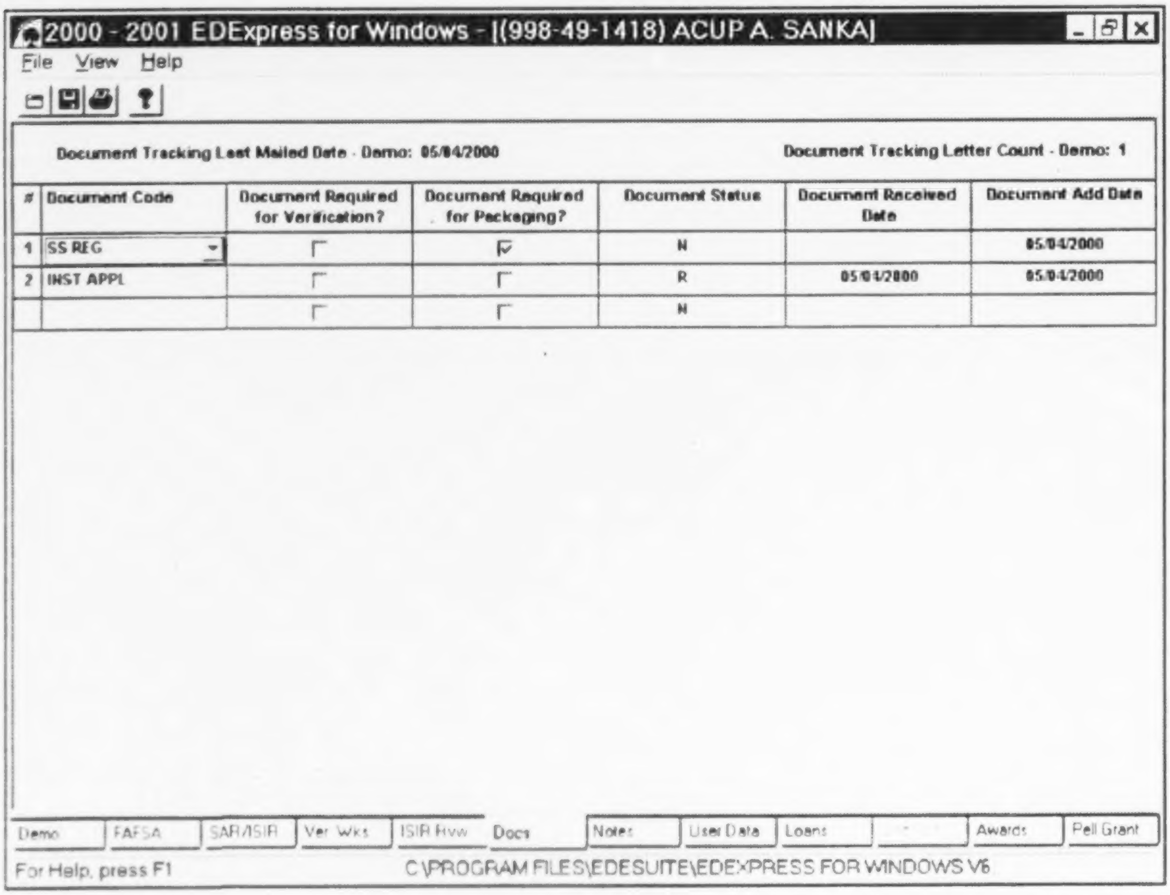
NUM

Open the student's record to see how generating the document tracking letter updates the document tracking record. The date the document tracking letter is generated/printed displays.

*Click the **Docs** Tab*

Tip: *Generating and printing the missing documents page of an award letter has no impact on any information tracked in the student's document record. Award letter information is part of the Packaging database, while document tracking information is part of the Global database.*

Remember: *EDExpress compares the student's document tracking information with the parameters you set in Global System Setup. If the maximum number of letters has been generated, or if the number of days between printing letters hasn't elapsed, you won't be able to include this record in a batch print.*



2000 - 2001 EDExpress for Windows - [(998-49-1418) ACUP A. SANKA]

Document Tracking Last Mailed Date - Demo: 05/04/2000

Document Tracking Letter Count - Demo: 1

#	Document Code	Document Required for Verification?	Document Required for Packaging?	Document Status	Document Received Date	Document Add Date
1	SS REG	☐	☑	N		05/04/2000
2	INST APPL	☐	☐	R	05/04/2000	05/04/2000
		☐	☐	N		

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6

Generating and Printing a Single Document Tracking Letter

To generate and print an award letter from an open student record

Click the ***Docs*** *tab*

Select ***File/Print*** *on the main menu bar*

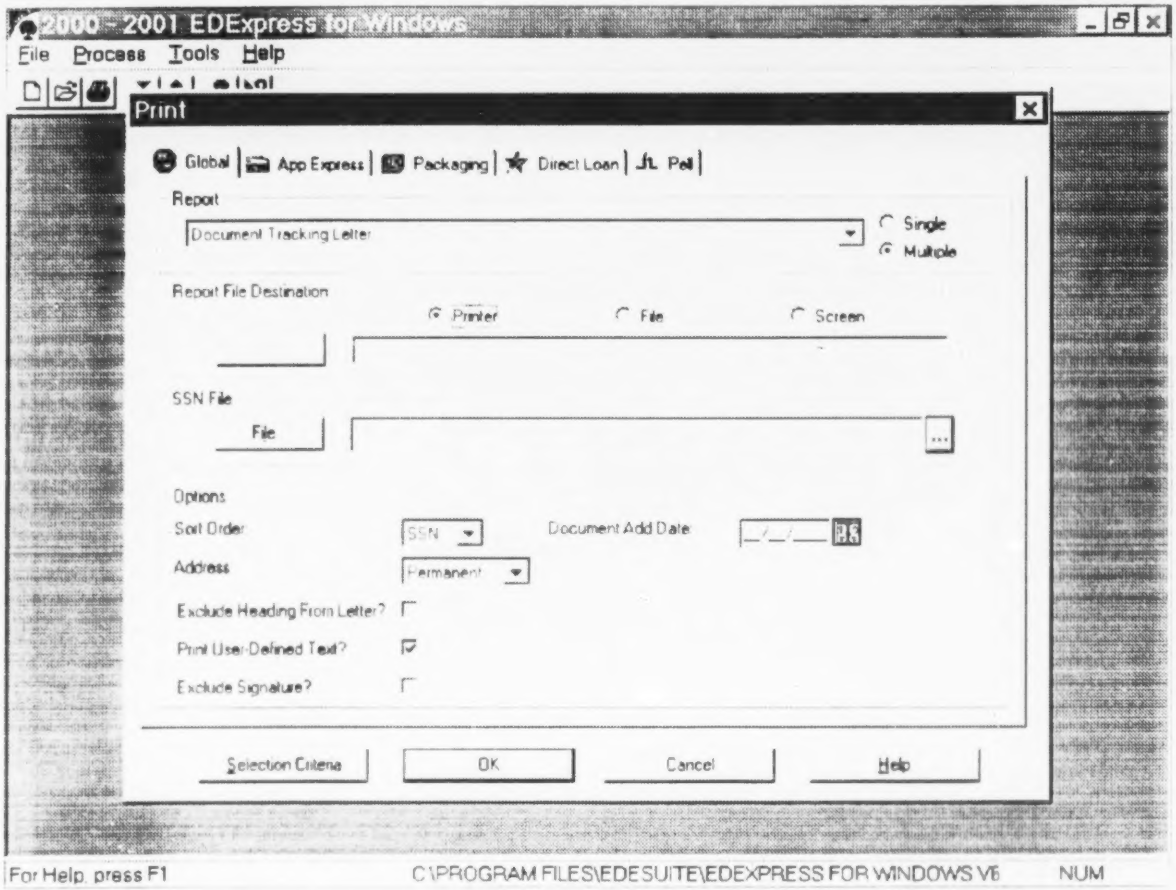
The Print dialog box displays

Under Report, select ***Document Tracking Letter***

In addition to generating and printing batches of document tracking letters, EDExpress also allows you to print a single letter from an open student record

The Print dialog box that displays is very similar to the one that displays when you generate and print multiple document tracking letters The only differences are that EDExpress defaults to print a single letter, the sort order option is excluded, and your only print option is printing the award letter directly to the printer

Tip: You can override the system defaults by printing a document tracking letter from an open student record


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Print
Global
App Express
Packaging
Direct Loan
Pell
Selection Criteria
OK
Cancel
Help

Report: Document Tracking Letter
○ Single
● Multiple

Report File Destination
● Printer
○ File
○ Screen

SSN File
File

Options
Sort Order: SSN
Document Add Date: __/__/____
Address: Permanent
Exclude Heading From Letter? ☐
Print User-Defined Text? ☑
Exclude Signature? ☐

For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

Unit 5

Working with Student Awards

Once you create student packaging records in the Packaging database, you are ready to award or package financial aid for your eligible students. However, after your students are packaged, you still have more work to do. You must generate award letters, monitor and revise financial aid packages as information about your students changes, track documents that are needed to complete files, disburse the aid to your Business Office, generate reports to help you manage or administer your school's financial aid budget, and complete other miscellaneous tasks.

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Lesson 1: Validating Packaging Data 5-3

Lesson 2: Creating and Modifying Financial Aid Packages 5-9

Lesson 3: Working with Award Letters 5-37

Lesson 4: Creating Export Packaging Files 5-54

Objectives

1. Use EDExpress features to manage packaging awards
2. Generate, print, and modify award letters
3. Create an external export file

[Slide 5-2]

370

Validating Packaging Data

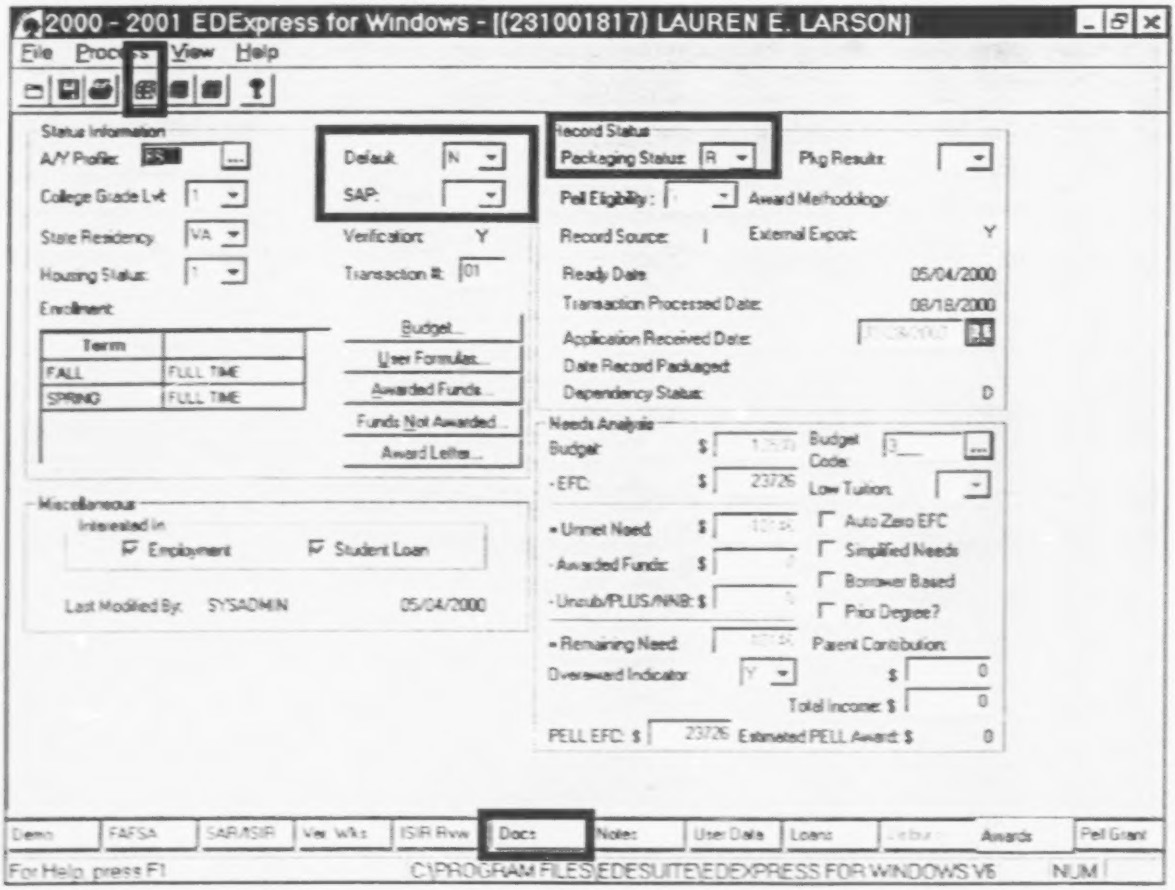
Before EDExpress allows you to award financial aid, certain data fields in the student's packaging record must be populated. In addition, the system checks the values in certain fields to verify that the student is eligible to be awarded financial aid. The EDExpress features that prevent you from automatically or manually packaging students who are ineligible include:

If the Package icon displays and the Packaging Status is R, the student record is ready to be packaged.

- Default field on Awards tab
- SAP field on Awards tab
- Document Status on Docs tab
- Query that ignores ineligible students based on selection criteria you specify when the Package process runs

Referring to a student record that is ready to be packaged, let's see how the packaging status changes according to values in these fields.

[Slide 5-3]



2000 - 2001 EDExpress for Windows - [(231001817) LAUREN E. LARSON]

Status Information
A/Y Profile: SS
College Grade Lvl: 1
State Residency: VA
Housing Status: 1

Enrollment

Term	
FALL	FULL TIME
SPRING	FULL TIME

Default: N
SAP:
Verification: Y
Transaction #: 01

Miscellaneous
Interested in
☑ Employment ☑ Student Loan
Last Modified By: SYSADMIN 05/04/2000

Record Status
Packaging Status: R
Pkg Results:
Pell Eligibility:
Award Methodology:
Record Source: I
External Export: Y
Ready Date: 05/04/2000
Transaction Processed Date: 08/18/2000
Application Received Date:
Date Record Packaged:
Dependency Status: D

Needs Analysis
Budget: $
Budget Code: 3
- EFC: $ 23726
Low Tuition:
= Unmet Need: $
- Awarded Funds: $
- Unsub/PLUS/NNB: $
= Remaining Need:
Overaward Indicator: Y
☐ Auto Zero EFC
☐ Simplified Needs
☐ Borrower Based
☐ Prior Degree?
Parent Contribution: $ 0
Total Income: $ 0
PELL EFC: $ 23726
Estimated PELL Award: $ 0

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6 NUM

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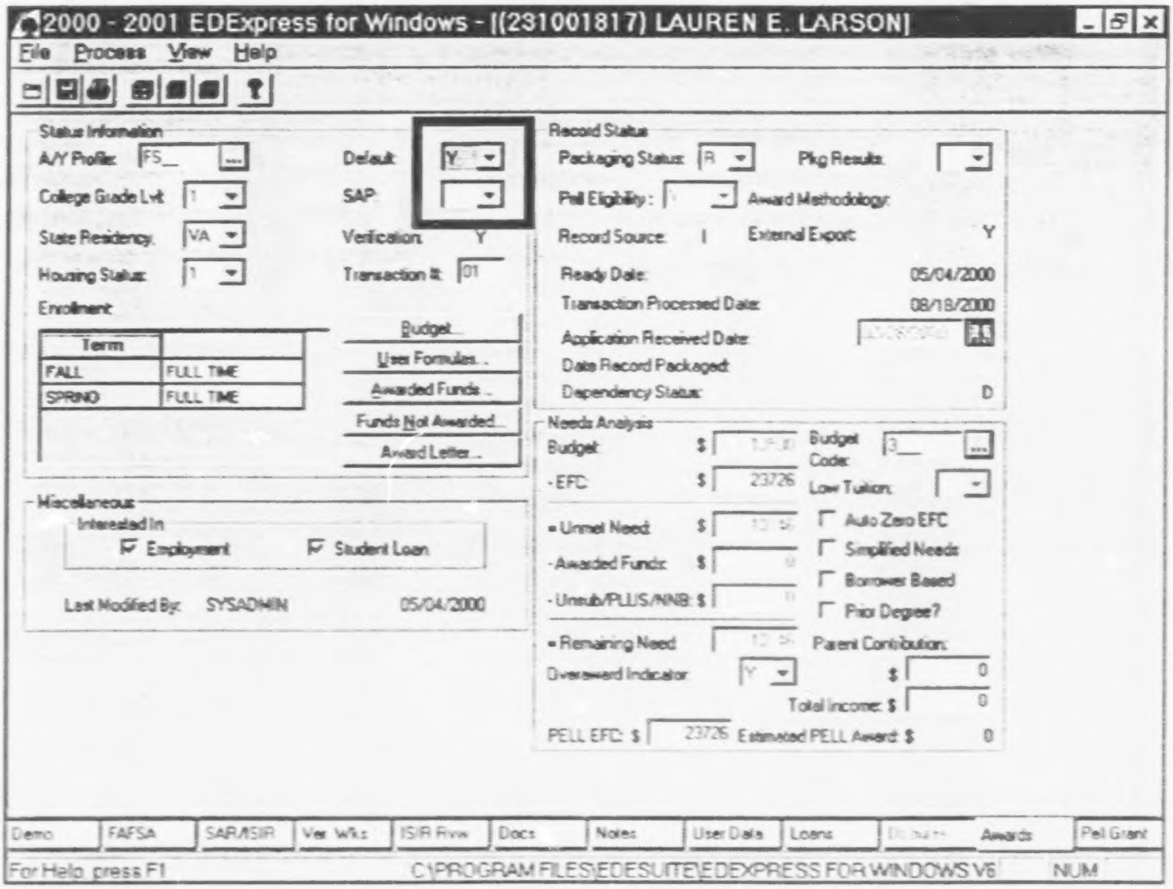
Default Value

Although the Package icon displays, only non-federal aid can be packaged for a student record with the Default value set to Y

For a student who is in loan default or owes a grant overpayment, change the Default value to Y (YES) to prevent federal aid from being packaged


2000 - 2001 EDExpress for Windows - [(231001817) LAUREN E. LARSON]
File
Process
View
Help
Budget...
User Formulas...
Awarded Funds...
Funds Not Awarded...
Award Letter...
Demo
FAFSA
SAR/ISIR
Ver. Wks
ISIR Rvw
Docs
Notes
User Data
Loans
Awards
Pell Grant

Status Information

A/Y Profile: FS__

College Grade Lvl: 1

State Residency: VA

Housing Status: 1

Default: Y

SAP:

Verification: Y

Transaction #: 01

Enrollment

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous

Interested In

☑ Employment ☑ Student Loan

Last Modified By: SYSADMIN 05/04/2000

Record Status

Packaging Status: R

Pkg Results:

Pell Eligibility:

Award Methodology:

Record Source: I

External Export: Y

Ready Date: 05/04/2000

Transaction Processed Date: 08/18/2000

Application Received Date: [illegible]

Date Record Packaged:

Dependency Status: D

Needs Analysis

Budget: $ [illegible]

Budget Code: 3__

- EFC: $ 23726

Low Tuition:

= Unmet Need: $ [illegible]

- Awarded Funds: $ 0

- Unsub/PLUS/NNB: $ 0

= Remaining Need [illegible]

☐ Auto Zero EFC

☐ Simplified Needs

☐ Borrower Based

☐ Prior Degree?

Overaward Indicator: Y

Parent Contribution: $ 0

Total Income: $ 0

PELL EFC: $ 23726

Estimated PELL Award: $ 0

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6 NUM

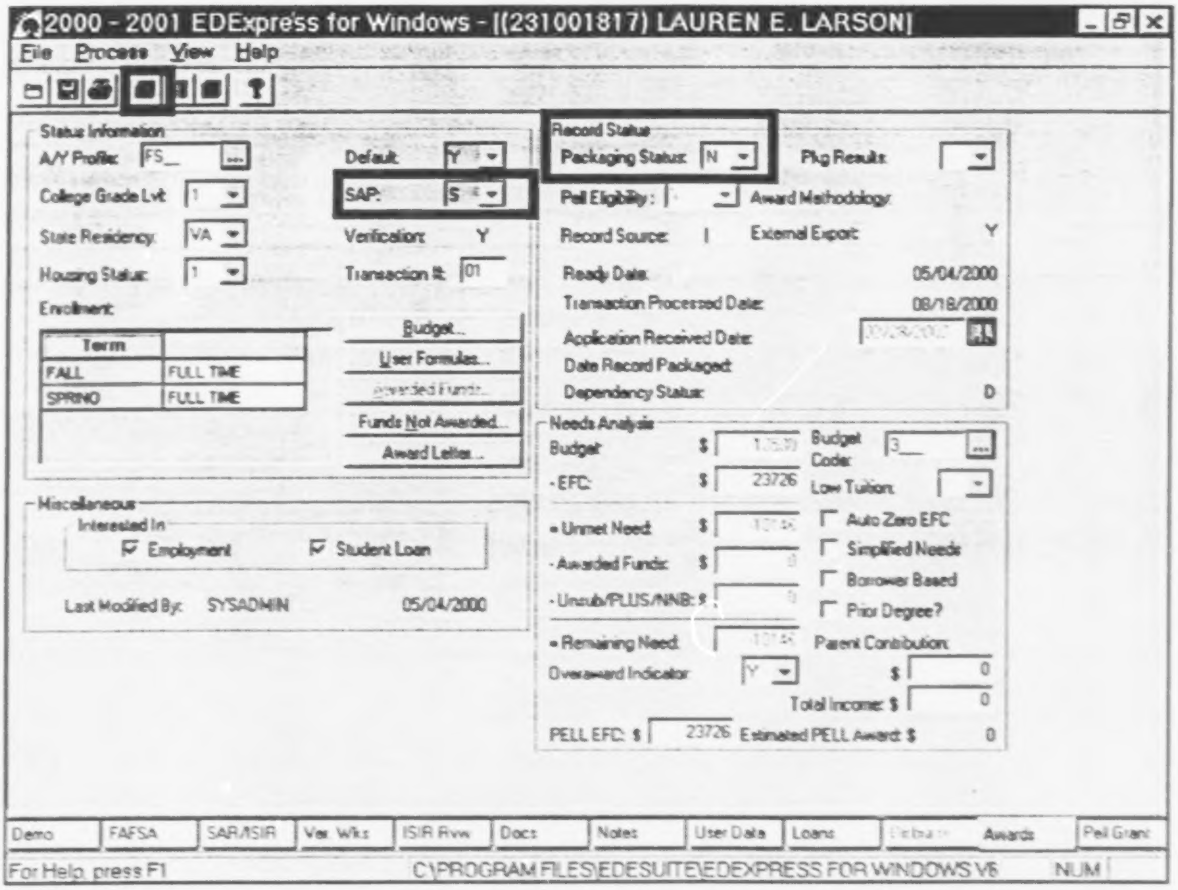
SAP Value

For a student not making satisfactory academic progress, populate the SAP field with a SAP code set up with the No Packaging Flag. Assigning any SAP code having the No Packaging Flag prevents all types of aid from being packaged.

[Slide 5-4]

Tip Refer to Unit 2, Lesson 10, page 2-180, for the steps to creating an SAP code

The Package icon is grayed out and the Packaging Status updates to N.



2000 - 2001 EDExpress for Windows - [(231001817) LAUREN E. LARSON]

File
Process
View
Help
Status Information
Enrollment
Budget...
User Formulas...
Awarded Funds...
Funds Not Awarded...
Award Letter...
Miscellaneous
Interested In
Record Status
Needs Analysis
Demo
FAFSA
SAR/ISIR
Ver. Wks
ISIR Rvw
Docs
Notes
User Data
Loans
Awards
Pell Grant
NUM

A/Y Profile: FS__
Default: Y
College Grade Lvl: 1
SAP: S
State Residency: VA
Verification: Y
Housing Status: 1
Transaction #: 01

Term	
FALL	FULL TIME
SPRING	FULL TIME

☑ Employment ☑ Student Loan

Last Modified By: SYSADMIN 05/04/2000

Packaging Status: N
Pkg Results:
Pell Eligibility:
Award Methodology:
Record Source: I
External Export: Y
Ready Date: 05/04/2000
Transaction Processed Date: 08/18/2000
Application Received Date: [illegible]
Date Record Packaged:
Dependency Status: D

Budget $ [illegible]
Budget Code: 3__
- EFC: $ 23726
Low Tuition:
= Unmet Need: $ [illegible]
- Awarded Funds: $ 0
- Unsub/PLUS/NNB: $ 0
= Remaining Need: [illegible]
☐ Auto Zero EFC
☐ Simplified Needs
☐ Borrower Based
☐ Prior Degree?
Parent Contribution: $ 0
Overaward Indicator: Y
Total Income: $ 0
PELL EFC: $ 23726
Estimated PELL Award: $ 0

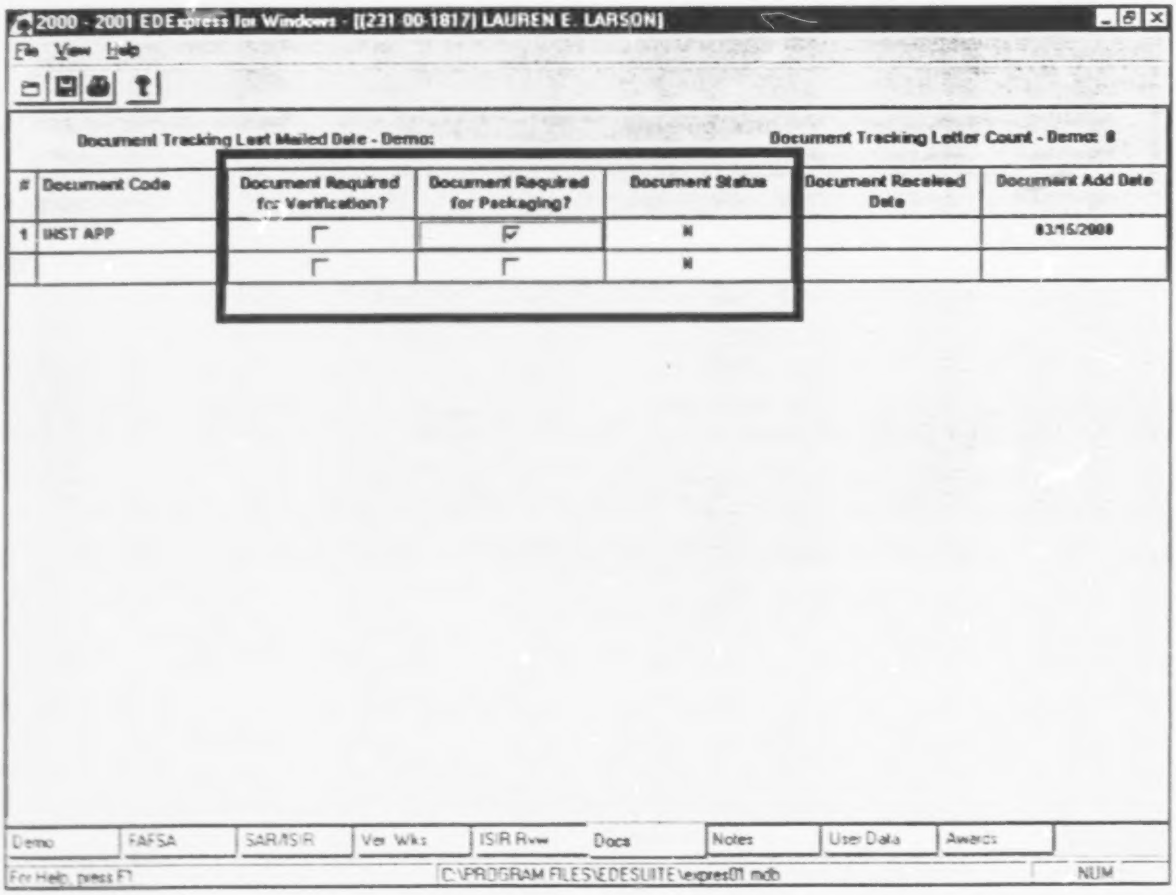
For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6

Document Status

Documents are assigned to student records automatically (according to how the document was created) or manually. In either case, the values in each of the columns listed below can be changed manually.

If any document is required for packaging, the system prevents all types of aid from being packaged automatically as long as the Document Status is N (Not Received) or I (Incomplete).

[Slide 5-5]


2000 - 2001 EDExpress for Windows - [(231-00-1817) LAUREN E. LARSON]
File
View
Help

Document Tracking Last Mailed Date - Demo:

Document Tracking Letter Count - Demo: 0

#	Document Code	Document Required for Verification?	Document Required for Packaging?	Document Status	Document Received Date	Document Add Date
1	INST APP	☐	☑	N		03/15/2000
		☐	☐	N		

Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards

For Help, press F1

C:\PROGRAM FILES\EDESUITE\expres01.mdb

NUM

Apply What You Learned

Let's complete an exercise that demonstrates using the batch Multiple Entry process to update records and to award a specific student population. In this case, you want to work with music majors.

1. Complete the Query Worksheet provided on page 5-9 to construct a parameter query that selects records based on major. Name the query Major.

2. Create the Query in the software.

3. Use the Multiple Entry/Global process to update the User Field "Major" (click the value column to display the drop-down list of existing user-defined fields) to the value "MUSIC" for the following student records:

   998-48-8196

   998-46-6218

   852-36-9741

4. Use the parameter query you just created with the Multiple Entry/Packaging function to award each of the students selected a $3000 music scholarship, with a fund decision of A. (The fund was created in the software for you.)

5. Are you able to update all three records? If no, why not?

6. Open each record that you were unable to award, and update whichever fields are needed to update the Packaging Status to R.

7. Manually add a $3000 music scholarship to each record identified in the previous step.

8. The Multiple Entry/Packaging function does not allow you to update Packaging Status. Therefore, update each record's Packaging Status to "H," to indicate that the records were hand packaged, and the Package Results to "A."

Query Worksheet

What Task do You Want to Perform?	What Module is Available to Create the Query to Perform this Task?
	☐ Apps ☐ Global ☐ DL ☐ Packaging ☐ Pell

Enter a title for the Query that describes the group of students to be selected:

Data Element	Operators	Value
Enter the data field(s) from the Module indicated above	=, <>, <, >, >=, <=, like, not like	☐ Prompt at Execution (to create a parameter query) ☐ Enter free-form or system-assigned value

☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

Creating and Modifying Financial Aid Packages

Let's review the methods you can use to create or package financial aid awards

- Working with one student record at a time, hand package or manually enter awards
- Working with one student record at a time, have the EDExpress system package funds based on your Award Methodologies
- Working with groups of students, have the EDExpress system package funds based on your Award Methodologies

[Slide 5-7]

As you know from experience, award packages often need to be modified for many reasons Students decline aid offered; they request different loan amounts; their eligibility changes, or funding levels change

EDExpress provides several tools or functions to help manage the ongoing award process

- **Package**—Awards funds on the Selection Criteria and priority order of Award Methodologies
- **Unpackage**—Undoes the Package process
- **Repackage**—Recomputes the entire aid package based on changes to the student's demographic or financial data, the award methodology, or fund parameters that have been saved to the database prior to running the Repackaging process

Each of these tools can be used to work with either a single student record or a group of records

Hand Packaging Process

The Hand Packaging feature allows you to manually package a student's record by adding award amounts in the Awarded Funds dialog box Examples of when to use this feature include

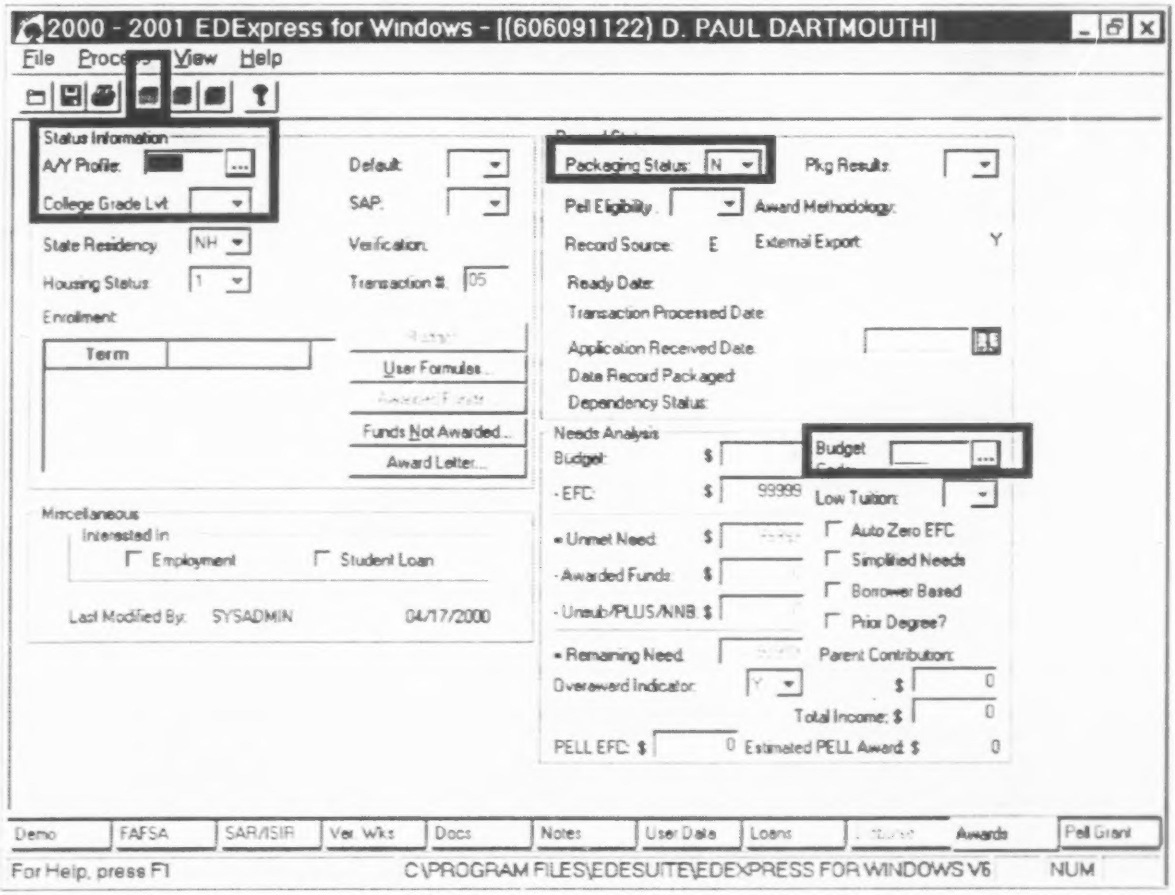
- You have a few students who do not meet any award methodology criteria
- You need to award institutional, state, or outside non-need based aid to students who have little or no need
- You need to add a scholarship to the student's package
- You need to revise the amount of a student's loan
- You need to override some value that prevents the record from being packaged in batch Process/Package

In order to hand package a record, the following are required

- The Packaging Status must be R (Ready), U (Unpackaged), or H (Hand Packaged)
- Either the Package or Repackage icon must display
- The Awarded Funds button must display

[Slide 5-8]

Let's walk through the steps of hand packaging a student who won't be filing a FASFA, whose record was added with the external add import, and who should receive an Honors Scholarship, an institutional merit award. Notice that the student is not ready to be packaged, because the system didn't update required data fields during the external add import.



2000 - 2001 EDExpress for Windows - [(606091122) D. PAUL DARTMOUTH]

Status Information
A/Y Profile:
College Grade Lvl:
State Residency: NH
Housing Status: 1
Default:
SAP:
Verification:
Transaction #: 05
Packaging Status: N
Pkg Results:
Pell Eligibility:
Award Methodology:
Record Source: E
External Export: Y
Ready Date:
Transaction Processed Date:
Application Received Date:
Date Record Packaged:
Dependency Status:
Needs Analysis
Budget: $
Budget Code:
- EFC: $ 99999
Low Tuition:
= Unmet Need: $
- Awarded Funds: $
- Unsub/PLUS/NNB: $
= Remaining Need:
Overaward Indicator: Y
☐ Auto Zero EFC
☐ Simplified Needs
☐ Borrower Based
☐ Prior Degree?
Parent Contribution: $ 0
Total Income: $ 0
PELL EFC: $ 0
Estimated PELL Award: $ 0
Miscellaneous
Interested in
☐ Employment
☐ Student Loan
Last Modified By: SYSADMIN 04/17/2000
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6

File
Process
View
Help
Enrollment
Term
Budget
User Formulas...
Awarded Funds
Funds Not Awarded...
Award Letter...
Demo
FAFSA
SAR/ISIR
Ver. Wks
Docs
Notes
User Data
Loans
Disburse
Awards
Pell Grant
NUM

Remember: *When a student is not going to file a FAFSA, it's a good idea to set some flags that prevent accidentally awarding federal and/or need-based aid. For example, you could assign an appropriate SAP value that prevents packaging altogether and/or you could update the EFC to 99999*

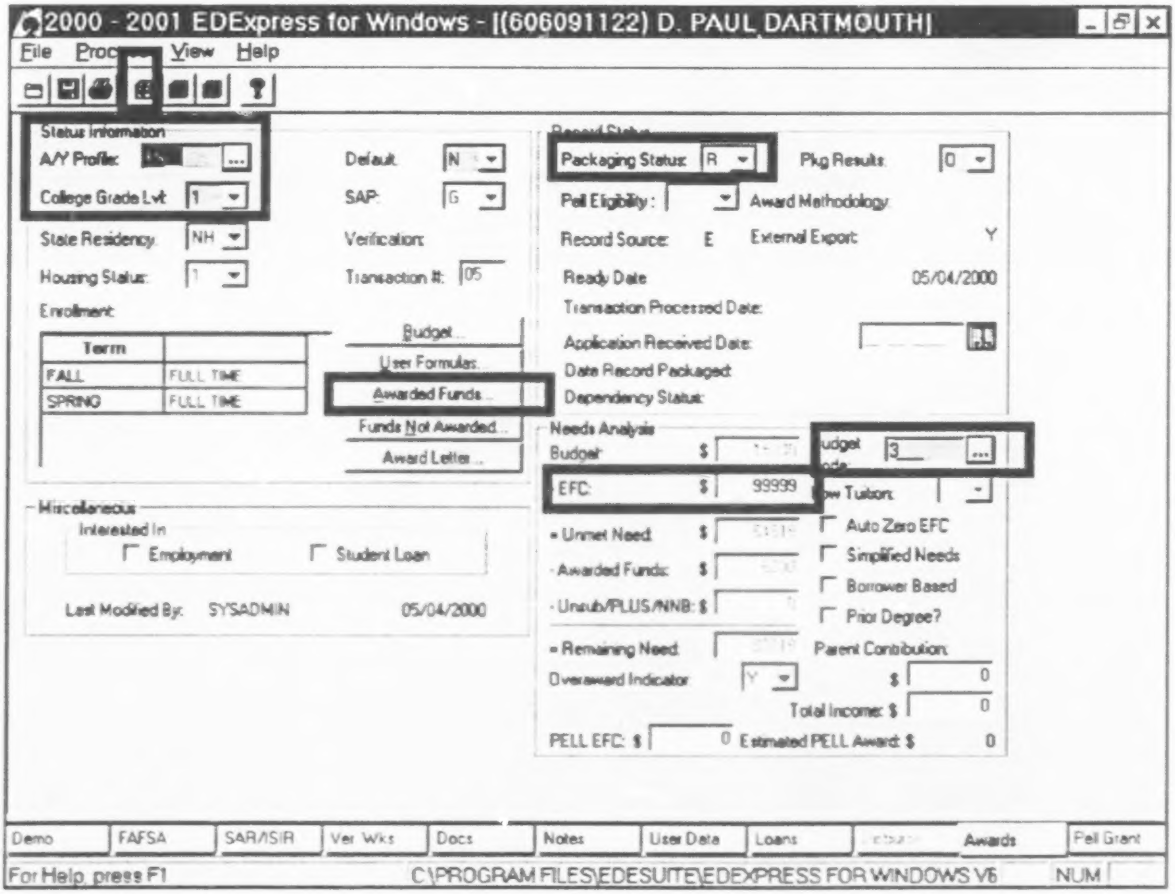
To hand package a student record

Update the required fields:

A/Y Profile
College Grade Level
Budget Code

*Click the **Save** icon, then click **OK***

*Click the **Awarded Funds** button*



2000 - 2001 EDExpress for Windows - [(606091122) D. PAUL DARTMOUTH]

File
Proc
View
Help
Status Information
Record Status
Budget...
User Formulas...
Awarded Funds...
Funds Not Awarded...
Award Letter...
Needs Analysis
Miscellaneous
Demo
FAFSA
SAR/ISIR
Ver Wks
Docs
Notes
User Data
Loans
Awards
Pell Grant

College Grade Lvl: 1
State Residency: NH
Housing Status: 1
Default: N
SAP: G
Verification:
Transaction #: 05

Enrollment

Term	
FALL	FULL TIME
SPRING	FULL TIME

Interested In
☐ Employment ☐ Student Loan

Last Modified By: SYSADMIN 05/04/2000

Packaging Status: R
Pkg Results: 0
Pell Eligibility:
Award Methodology:
Record Source: E
External Export: Y
Ready Date: 05/04/2000
Transaction Processed Date:
Application Received Date:
Date Record Packaged:
Dependency Status:

Budget: $
Budget Code: 3
EFC: $ 99999
Tuition:
= Unmet Need: $
- Awarded Funds: $
- Unsub/PLUS/NNB: $
= Remaining Need:
Overaward Indicator: Y
☐ Auto Zero EFC
☐ Simplified Needs
☐ Borrower Based
☐ Prior Degree?
Parent Contribution: $ 0
Total Income: $ 0
PELL EFC: $ 0
Estimated PELL Award: $ 0

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6 NUM

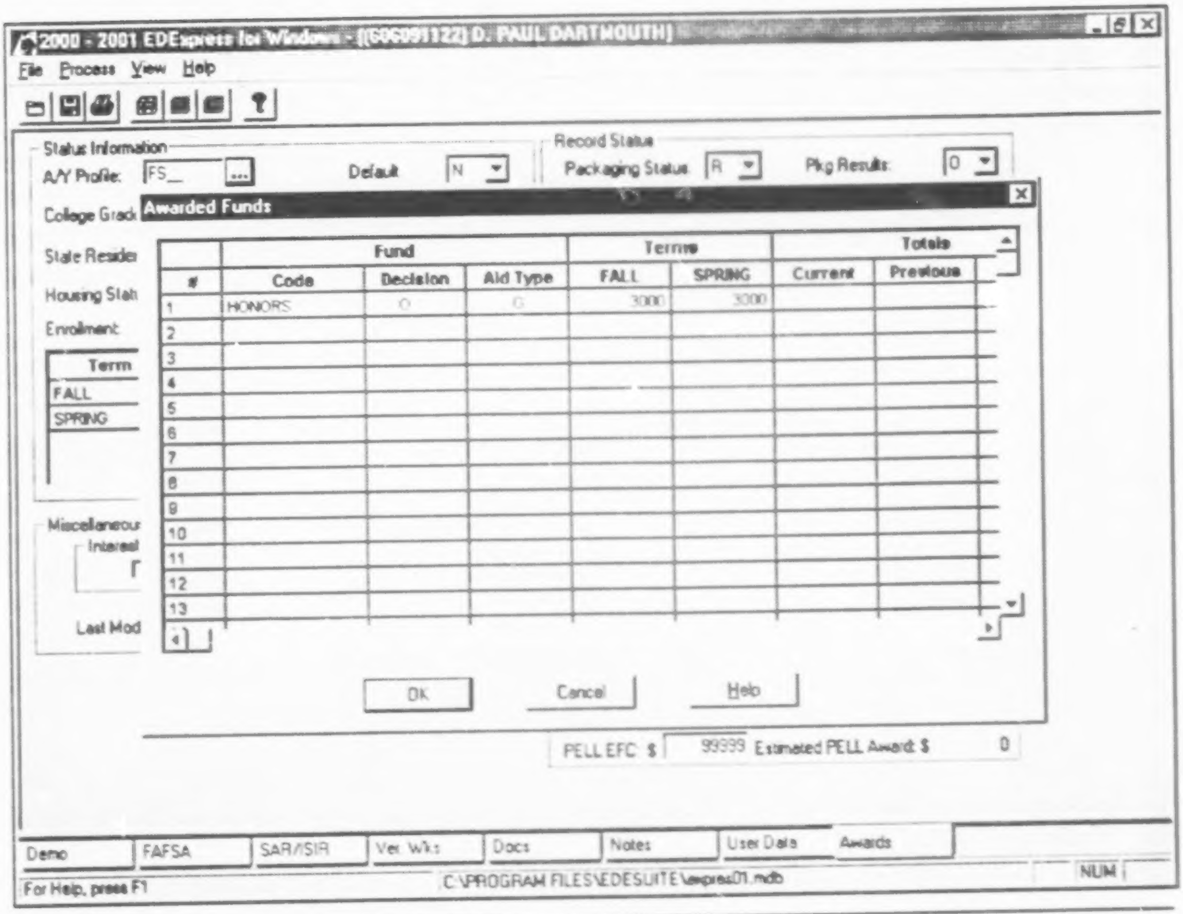
The Awarded Funds dialog box appears

*On the first blank row, click **Code** to display to drop-down list of available funds*

Select the code

Enter the award amounts for each term

Notice that when you click from the Code field to another, both the Aid Type and the default Decision values display.


2000 - 2001 EDExpress for Windows - [(606091122) D. PAUL DARTMOUTH]
File
Process
View
Help
Status Information
Record Status
College Grad
State Resider
Housing Stat
Enrollment
Miscellaneous
Interest
Last Mod
Awarded Funds
OK
Cancel
Help
Demo
FAFSA
SAR/ISIR
Ver. Wks
Docs
Notes
User Data
Awards
For Help, press F1
NUM

A/Y Profile: FS_
Default: N
Packaging Status: R
Pkg Results: 0

Term
FALL
SPRING

	Fund			Terms		Totals	
#	Code	Decision	Aid Type	FALL	SPRING	Current	Previous
1	HONORS	O	G	3000	3000		
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							

PELL EFC: $ 99999 Estimated PELL Award: $ 0

C:\PROGRAM FILES\EDESUITE\expres01.mdb

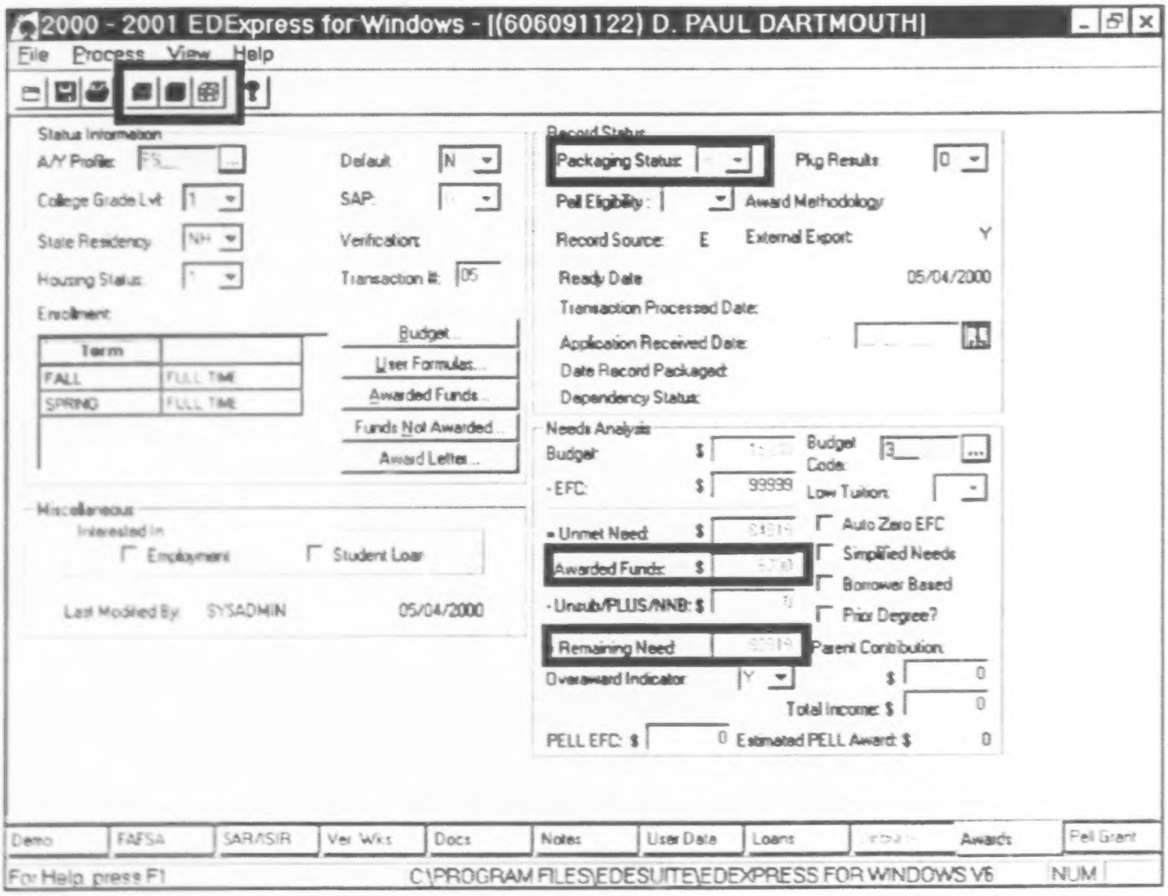
When you save the award

- The Awarded Funds value updates
- The Remaining Need value updates
- The Package icon is grayed out
- The Unpackage and Repackage icons display

*Click **OK** to return to the Packaging record*

*Update the Packing Status to **H** (Hand Packaged)*

*Click the **Save** icon to save the award*


2000 - 2001 EDExpress for Windows - [(606091122) D. PAUL DARTMOUTH]

Status Information
A/Y Profile: FS
College Grade Lvl: 1
State Residency: NH
Housing Status: 1
Default: N
SAP:
Verification:
Transaction #: 05

Enrollment

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous
Interested In
☐ Employment ☐ Student Loan
Last Modified By: SYSADMIN 05/04/2000

Record Status
Packaging Status:
Pkg Results: 0
Pell Eligibility:
Award Methodology
Record Source: E
External Export: Y
Ready Date: 05/04/2000
Transaction Processed Date:
Application Received Date:
Date Record Packaged:
Dependency Status:

Needs Analysis
Budget: $ [illegible]
Budget Code: 3
- EFC: $ 99999
Low Tuition:
= Unmet Need: $ [illegible]
Awarded Funds: $ [illegible]
- Unsub/PLUS/NNB: $ 0
Remaining Need: [illegible]
☐ Auto Zero EFC
☐ Simplified Needs
☐ Borrower Based
☐ Prior Degree?
Parent Contribution: $ 0
Overaward Indicator: Y
Total Income: $ 0
PELL EFC: $ 0
Estimated PELL Award: $ 0

For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

File
Process
View
Help
Budget...
User Formulas...
Awarded Funds...
Funds Not Awarded...
Award Letter...
Demo
FAFSA
SAR/ISIR
Ver Wks
Docs
Notes
User Data
Loans
Awards
Pell Grant

Package Function: Single Record

To have the system package a student record

Open the record

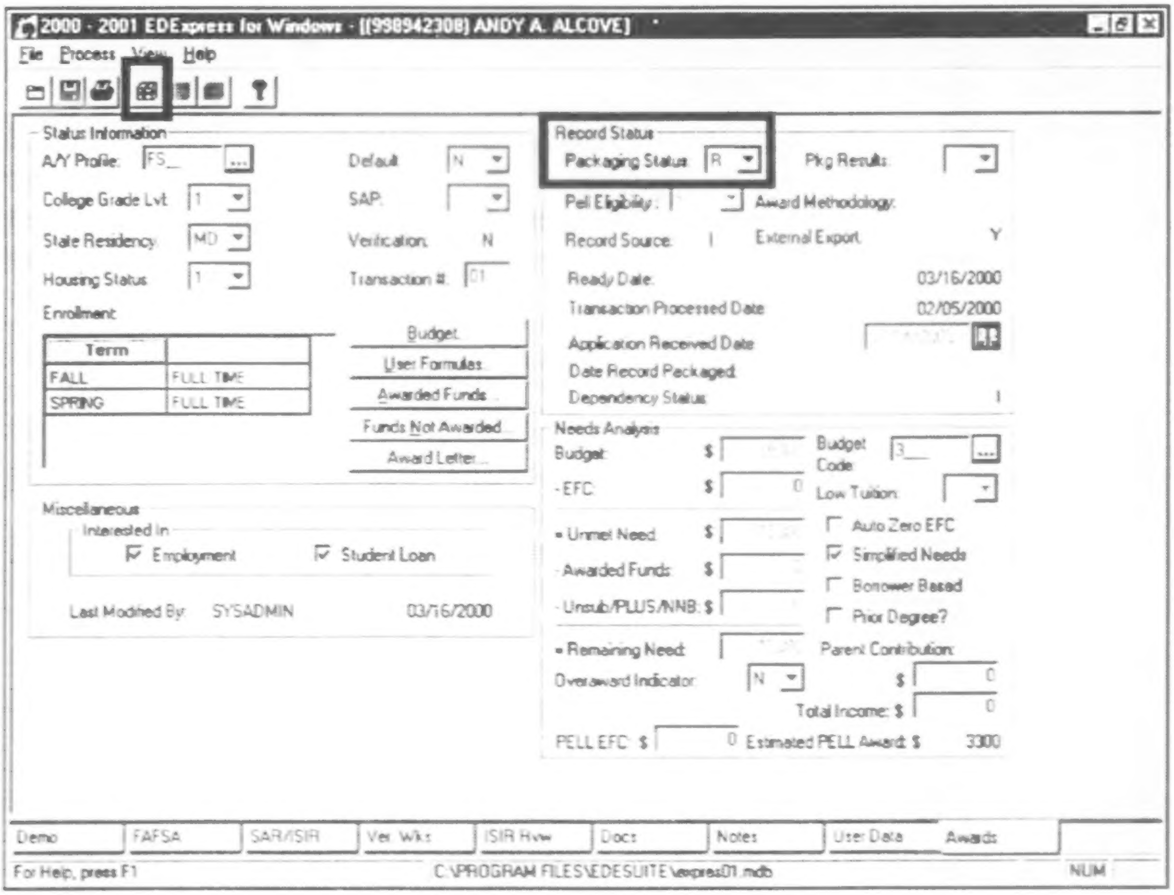
Verify that the record is ready to be packaged

*Click the **Package** icon (green box)*

Each of the Package, Unpackage, and Repackage processes can be run to work with both one student record at a time and a group of records. To work with a single student record, the process you follow is similar to Hand Packaging.

[Slide 5-9]

Tip The Package function, for either an open student record or multiple records, does not overwrite awards added manually.


2000 - 2001 EDExpress for Windows - [(998942308) ANDY A. ALCOVE]

Status Information
A/Y Profile: FS_
College Grade Lvl: 1
State Residency: MD
Housing Status: 1
Default: N
SAP:
Verification: N
Transaction #: 01

Enrollment

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous
Interested In
☑ Employment
☑ Student Loan
Last Modified By: SYSADMIN 03/16/2000

Record Status
Packaging Status: R
Pkg Results:
Pell Eligibility:
Award Methodology:
Record Source: I
External Export: Y
Ready Date: 03/16/2000
Transaction Processed Date: 02/05/2000
Application Received Date
Date Record Packaged:
Dependency Status: I

Needs Analysis
Budget: $
- EFC: $ 0
= Unmet Need: $
- Awarded Funds: $
- Unsub/PLUS/NNB: $
= Remaining Need:
Overaward Indicator: N
Budget Code: 3_
Low Tuition:
☐ Auto Zero EFC
☑ Simplified Needs
☐ Borrower Based
☐ Prior Degree?
Parent Contribution: $ 0
Total Income: $ 0
PELL EFC: $ 0
Estimated PELL Award: $ 3300

For Help, press F1
C:\PROGRAM FILES\EDESUITE\express01.mdb

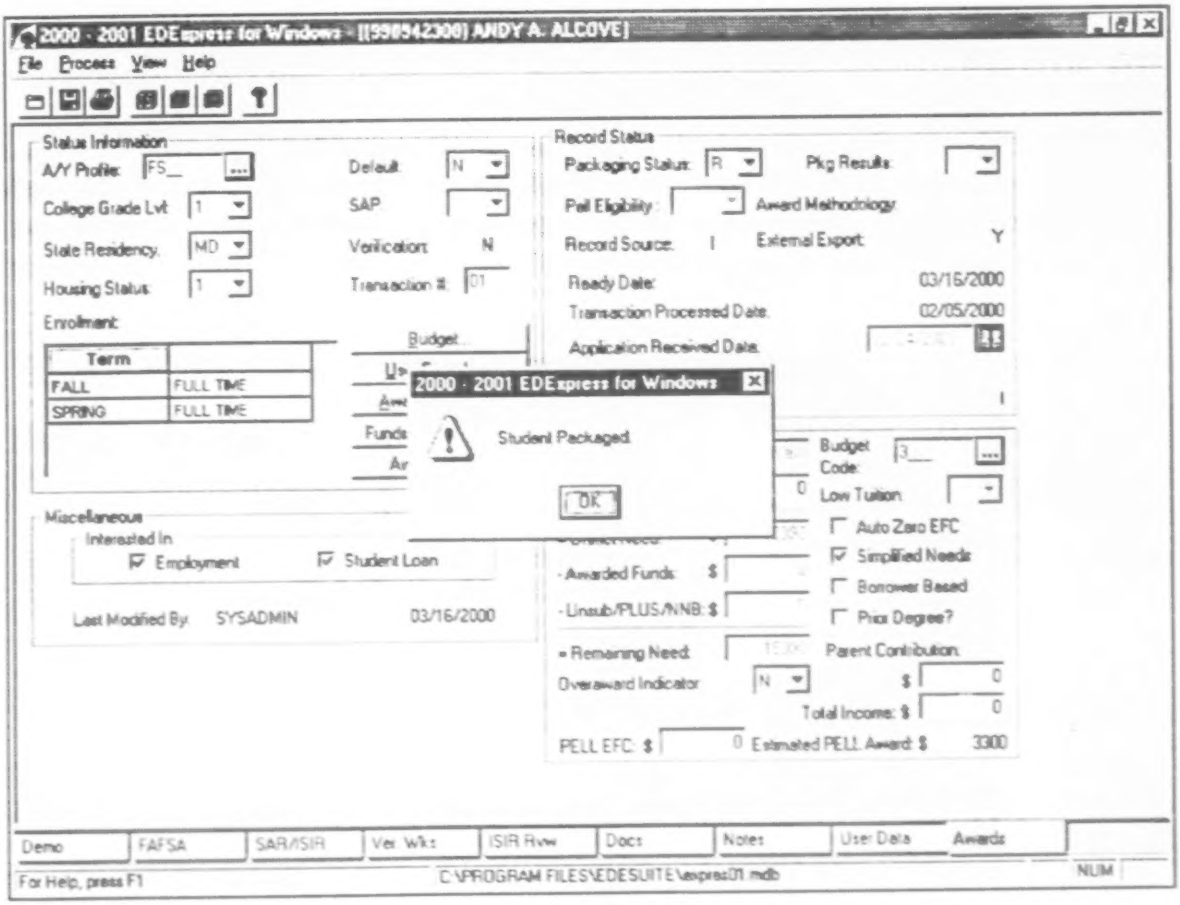
***Remember:** The Package process is fueled by the Award Methodologies you create. And the principle of Award Methodologies is to package aid for students having ISIR data. Therefore, you need to plan how to handle awarding students who do not file the FAFSA.*

A Student Packaged dialog box displays.

*Click **OK***

A Record Updates Saved dialog box displays.

*Click **OK***



2000 - 2001 EDExpress for Windows - [[990542300] ANDY A. ALCOVE]

Status Information

A/Y Profile: FS__
College Grade Lvl: 1
State Residency: MD
Housing Status: 1
Default: N
SAP:
Verification: N
Transaction #: 01

Enrollment

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous

Interested In
☑ Employment
☑ Student Loan

Last Modified By: SYSADMIN 03/16/2000

Record Status

Packaging Status: R
Pkg Results:
Pell Eligibility:
Award Methodology:
Record Source: I
External Export: Y
Ready Date: 03/16/2000
Transaction Processed Date: 02/05/2000
Application Received Date:

2000 - 2001 EDExpress for Windows

Student Packaged

Budget Code: 3__
Low Tuition:
☐ Auto Zero EFC
☑ Simplified Needs
☐ Borrower Based
☐ Prior Degree?
- Awarded Funds: $
- Unsub/PLUS/NNB: $
= Remaining Need:
Overaward Indicator: N
Parent Contribution: $ 0
Total Income: $ 0
PELL EFC: $ 0
Estimated PELL Award: $ 3300

For Help, press F1
C:\PROGRAM FILES\EDESUITE\expres01.mdb
NUM

To manually change awards for an open student record:

*Click the **Awarded Funds** button.*

Make changes you want to the awards.

*Click **OK**.*

*Click the **Save** icon.*

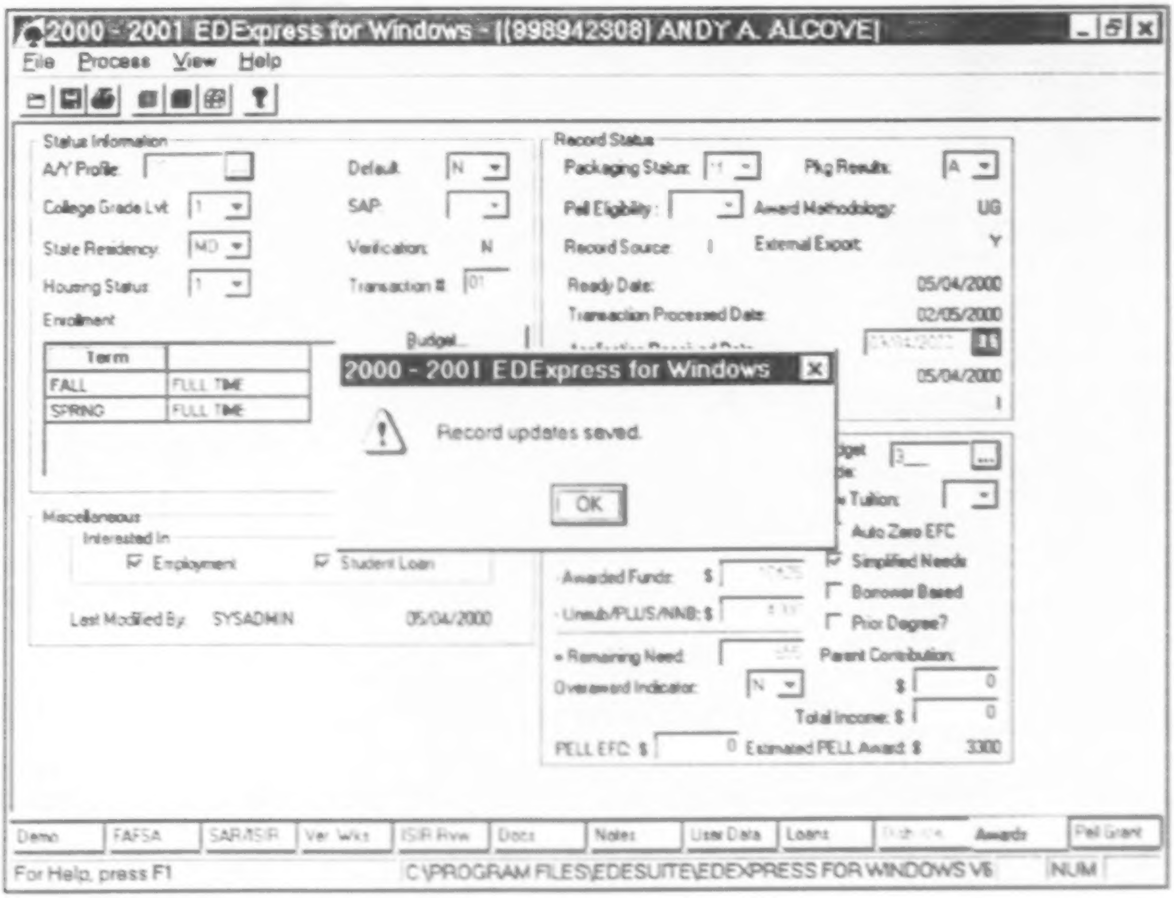
A Record Updates Saved dialog box displays.

*Click **OK**.*

After the Packaging process runs, the Award Methodology field displays the Methodology Code the system used to package the record along with the values updated in other fields.

You can review the funds and amounts awarded by the methodology under the Awarded Funds button, and you can make manual adjustments as needed.

Tip *If the system is not packaging aid as you think it should, double check the maximum self-help and gift aid values defined in the award methodology.*



2000 - 2001 EDExpress for Windows - [(998942308) ANDY A. ALCOVE]

Status Information

A/Y Profile:

College Grade Lvl: 1

State Residency: MD

Housing Status: 1

Default: N

SAP:

Verification: N

Transaction #: 01

Enrollment

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous

Interested In

☑ Employment ☑ Student Loan

Last Modified By: SYSADMIN 05/04/2000

Record Status

Packaging Status: 11

Pkg Results: A

Pell Eligibility:

Award Methodology: UG

Record Source: I

External Export: Y

Ready Date: 05/04/2000

Transaction Processed Date: 02/05/2000

05/04/2000

I

Budget: 3

Tuition:

Auto Zero EFC

☑ Simplified Needs

☐ Borrower Based

☐ Prior Degree?

- Awarded Funds: $ [illegible]

- Unsub/PLUS/NNB: $ [illegible]

= Remaining Need: [illegible]

Overaward Indicator: N

Parent Contribution: $ 0

Total Income: $ 0

PELL EFC: $ 0

Estimated PELL Award: $ 3300

2000 - 2001 EDExpress for Windows

Record updates saved.

For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6

Under the Funds Not Awarded tab, you can view information about funds that are part of the Methodology but that were not awarded

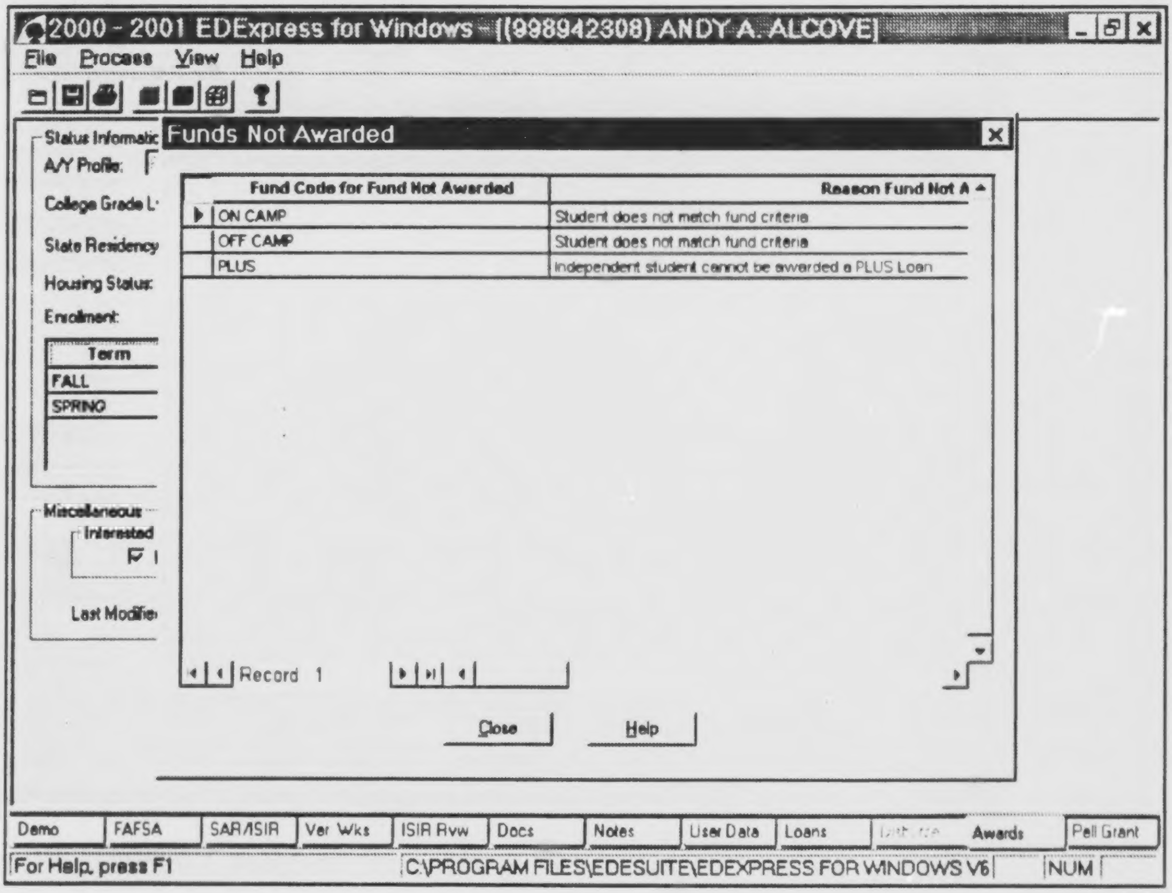
In this example, all funds tied to the Need Methodology were awarded, so the No Records Selected dialog box displays. However, if funds had not been awarded, a Funds Not Awarded dialog box displays the fund code(s) not awarded and the reason(s).

To review funds not awarded by the Methodology

*Click the **Funds Not Awarded** button*

*Click **OK***

A No Records Selected dialog box displays.


2000 - 2001 EDExpress for Windows - [(998942308) ANDY A. ALCOVE]
File
Process
View
Help
Status Informatic
A/Y Profile:
College Grade L
State Residency
Housing Status:
Enrollment:
Term
FALL
SPRING
Miscellaneous
Interested
Last Modifie
Funds Not Awarded
Record 1
Close
Help
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Loans
Awards
Pell Grant
For Help, press F1
NUM

Fund Code for Fund Not Awarded	Reason Fund Not A
ON CAMP	Student does not match fund criteria
OFF CAMP	Student does not match fund criteria
PLUS	Independent student cannot be awarded a PLUS Loan

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6

To unpackage an award from an open student record

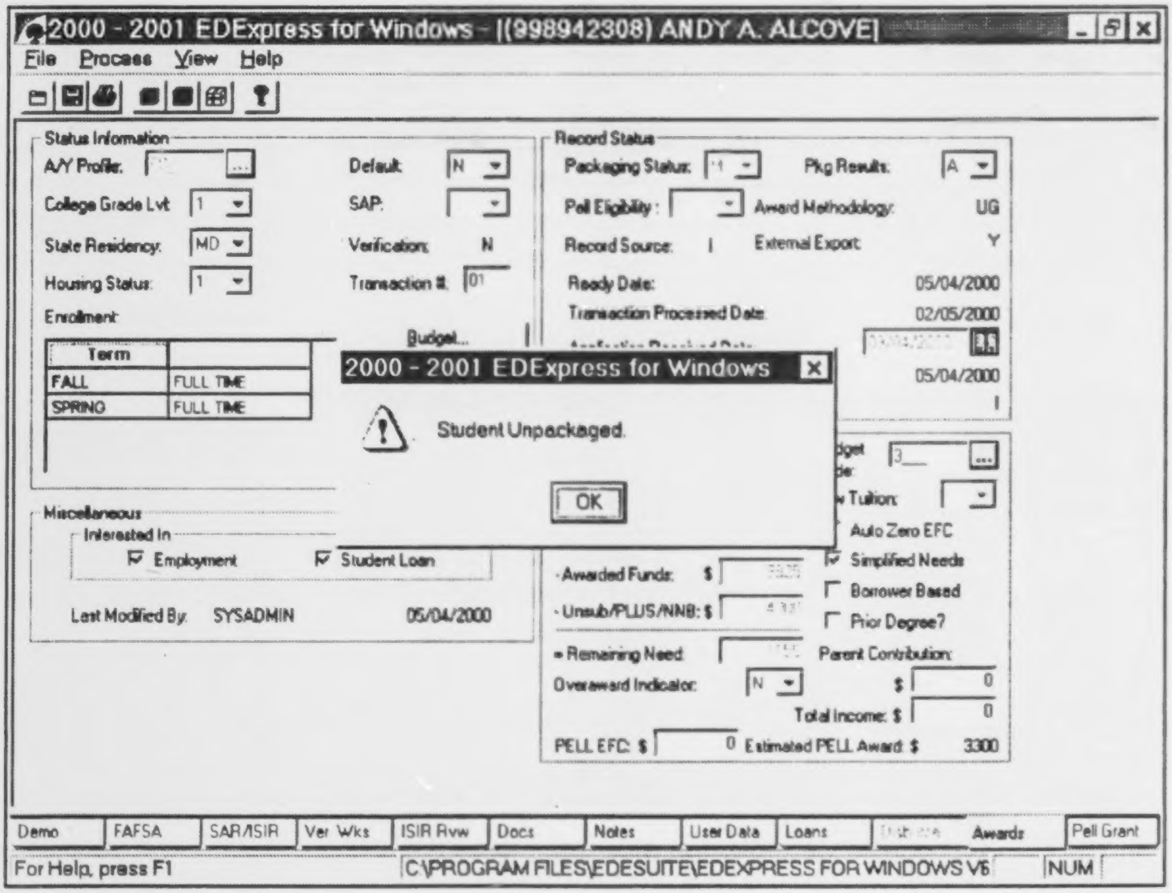
Click the ***Unpackage*** *icon (red box)*

A Student Unpackaged dialog box displays

Click ***OK***

A Records Updates Saved dialog box displays

The Unpackage feature removes all awards EXCEPT outside resources (aid type O)



2000 - 2001 EDExpress for Windows - [(998942308) ANDY A. ALCOVE]

Status Information

A/Y Profile:

Default: N

College Grade Lvl: 1

SAP:

State Residency: MD

Verification: N

Housing Status: 1

Transaction #: 01

Enrollment

Term	
FALL	FULL TIME
SPRING	FULL TIME

Record Status

Pkg Results: A

Pell Eligibility:

Award Methodology: UG

Record Source: I

External Export: Y

Ready Date: 05/04/2000

Transaction Processed Date: 02/05/2000

05/04/2000

I

Budget Code: 3

Tuition:

☐ Auto Zero EFC

☑ Simplified Needs

☐ Borrower Based

☐ Prior Degree?

- Awarded Funds: $

- Unsub/PLUS/NNB: $

= Remaining Need

Overaward Indicator: N

Parent Contribution: $ 0

Total Income: $ 0

PELL EFC: $ 0

Estimated PELL Award: $ 3300

Miscellaneous

Interested In

☑ Employment ☑ Student Loan

Last Modified By: SYSADMIN 05/04/2000

2000 - 2001 EDExpress for Windows

Student Unpackaged.

OK

For Help, press F1

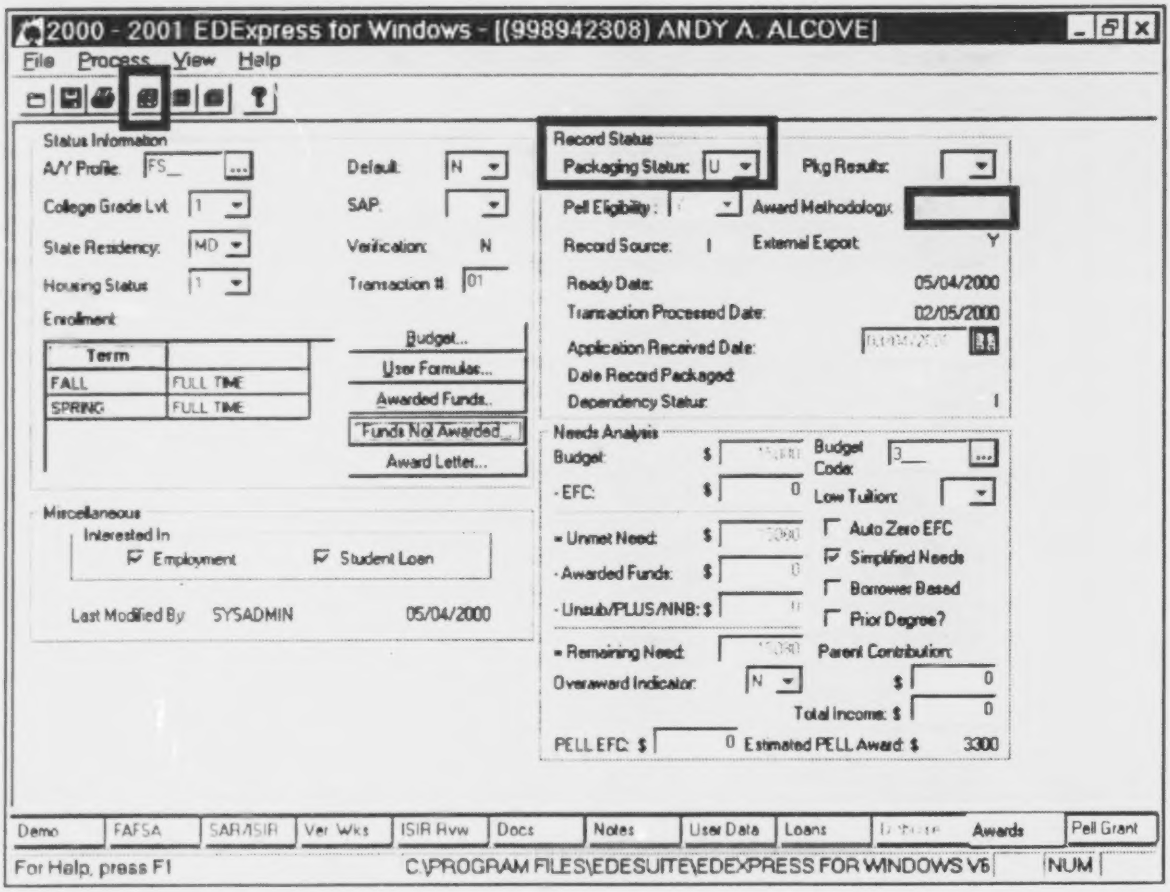
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6

NUM

*Click **OK** again to save the update*

The Package icon displays

The various fields are recalculated and/or updated


File
Process
View
Help
Budget...
User Formulas...
Awarded Funds..
Funds Not Awarded...
Award Letter...
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Loans
Awards
Pell Grant
For Help, press F1
NUM

2000 - 2001 EDExpress for Windows - [(998942308) ANDY A. ALCOVE]

Status Information
A/Y Profile: FS_
College Grade Lvl: 1
State Residency: MD
Housing Status: 1
Default: N
SAP:
Verification: N
Transaction #: 01

Enrollment

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous
Interested In
☑ Employment ☑ Student Loan
Last Modified By SYSADMIN 05/04/2000

Record Status
Packaging Status: U
Pkg Results:
Pell Eligibility:
Award Methodology:
Record Source: I
External Export: Y
Ready Date: 05/04/2000
Transaction Processed Date: 02/05/2000
Application Received Date:
Date Record Packaged:
Dependency Status: I

Needs Analysis
Budget: $
- EFC: $ 0
= Unmet Need: $
- Awarded Funds: $ 0
- Unsub/PLUS/NNB: $ 0
= Remaining Need:
Overaward Indicator: N
Budget Code: 3__
Low Tuition:
☐ Auto Zero EFC
☑ Simplified Needs
☐ Borrower Based
☐ Prior Degree?
Parent Contribution: $ 0
Total Income: $ 0
PELL EFC: $ 0 Estimated PELL Award: $ 3300

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6

To repackage an award from an open student record

Click the ***Repackage*** *icon (yellow box)*

A Student Repackaged dialog box displays

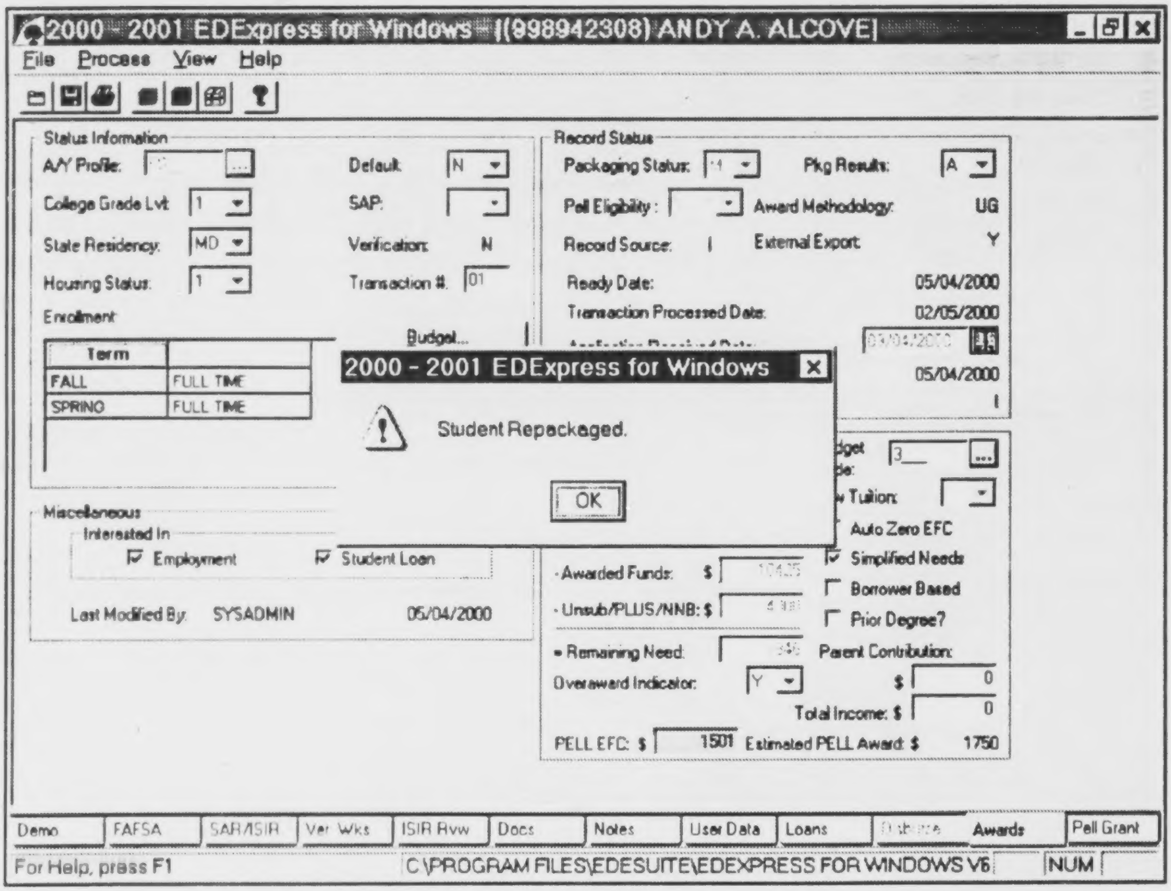
Click ***OK***

A Record Updates Saved dialog box displays

Click ***OK*** *again to save the update*

Use the Repackage feature when you want to revise the student's package based on new information. Note that Repackaging does not remove awards from outside resources (aid type O).

For example, changes to the ISIR may result in a different EFC calculation and impact the student's need. In the example below, the student's EFC changed from 0 to 1501, resulting in an overaward of need-based aid.


2000 - 2001 EDExpress for Windows - [(998942308) ANDY A. ALCOVE]
File Process View Help
Demo FAFSA SAR/ISIR Ver Wks ISIR Rvw Docs Notes User Data Loans Disburse Awards Pell Grant
Budget...
OK

2000 - 2001 EDExpress for Windows

Student Repackaged.

Status Information
A/Y Profile:
College Grade Lvl: 1
State Residency: MD
Housing Status: 1
Default: N
SAP:
Verification: N
Transaction #: 01

Enrollment

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous
Interested In
☑ Employment ☑ Student Loan
Last Modified By: SYSADMIN 05/04/2000

Record Status
Packaging Status:
Pkg Results: A
Pell Eligibility:
Award Methodology: UG
Record Source: I
External Export: Y
Ready Date: 05/04/2000
Transaction Processed Date: 02/05/2000
05/04/2000

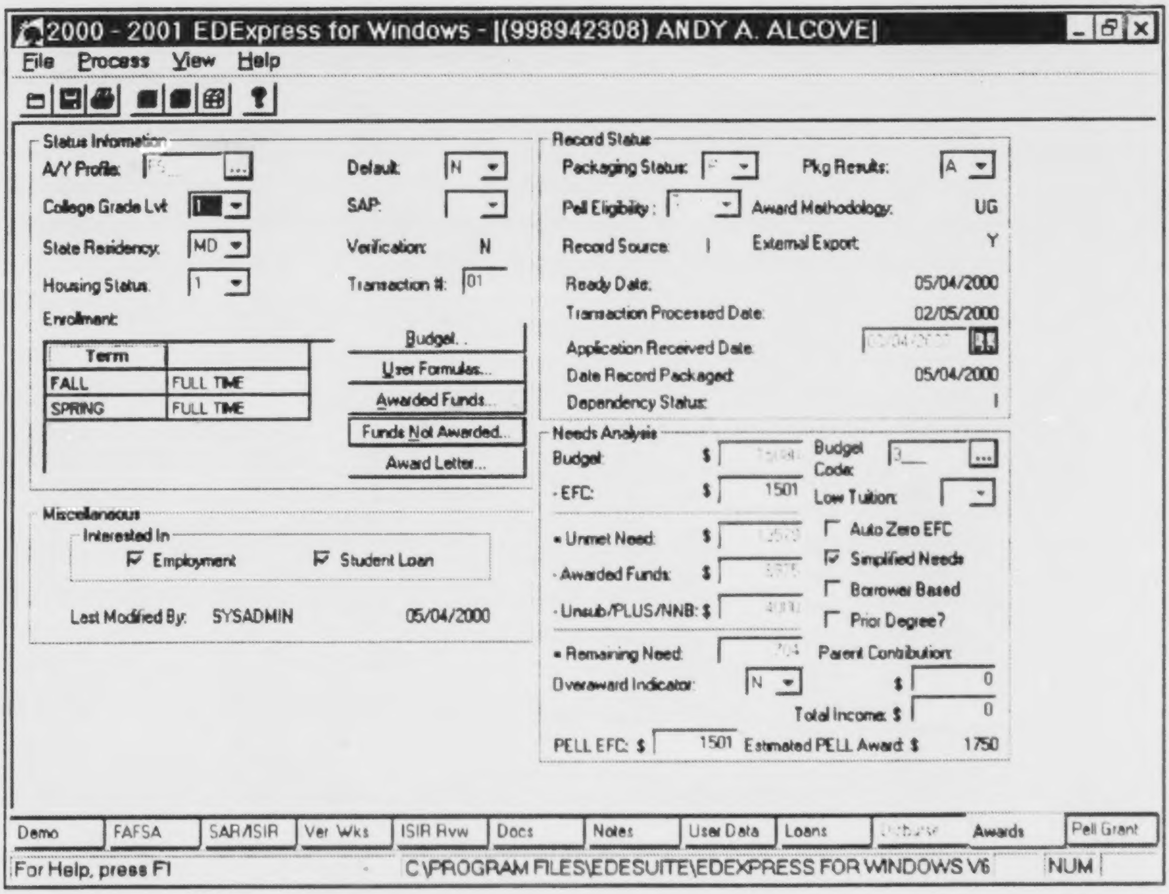
Budget Code: 3
Auto Zero EFC
☑ Simplified Needs
☐ Borrower Based
☐ Prior Degree?
- Awarded Funds: $
- Unsub/PLUS/NNB: $
= Remaining Need:
Overaward Indicator: Y
Parent Contribution: $ 0
Total Income: $ 0
PELL EFC: $ 1501 Estimated PELL Award: $ 1750

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6 NUM

☝ ***Remember:*** *When you repackage an open student record, with the exception of outside resources, manual changes you previously made to the original package will be wiped out. To repackage without overwriting manual entries, use the Repackage process function from the main menu.*

The UnPackage and Repackage icons display.

The various fields are recalculated and/or updated.


2000 - 2001 EDExpress for Windows - [(998942308) ANDY A. ALCOVE]

File
Process
View
Help

Status Information

A/Y Profile:
College Grade Lvl: 1
State Residency: MD
Housing Status: 1
Default: N
SAP:
Verification: N
Transaction #: 01

Enrollment:

Term	
FALL	FULL TIME
SPRING	FULL TIME

Budget...
User Formulas...
Awarded Funds...
Funds Not Awarded...
Award Letter...

Miscellaneous

Interested In
☑ Employment
☑ Student Loan

Last Modified By: SYSADMIN 05/04/2000

Record Status

Packaging Status:
Pkg Results: A
Pell Eligibility:
Award Methodology: UG
Record Source: I
External Export: Y
Ready Date: 05/04/2000
Transaction Processed Date: 02/05/2000
Application Received Date:
Date Record Packaged: 05/04/2000
Dependency Status: I

Needs Analysis

Budget: $ [illegible]
- EFC: $ 1501
= Unmet Need: $ [illegible]
- Awarded Funds: $ [illegible]
- Unsub/PLUS/NNB: $ 4000
= Remaining Need: 704
Overaward Indicator: N
Budget Code: 3
Low Tuition:
☐ Auto Zero EFC
☑ Simplified Needs
☐ Borrower Based
☐ Prior Degree?
Parent Contribution: $ 0
Total Income: $ 0
PELL EFC: $ 1501
Estimated PELL Award: $ 1750

Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Loans
Disburse
Awards
Pell Grant

For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

Package Function: Multiple Records

To package multiple student records

*Click **Process/Package** from the menu bar*

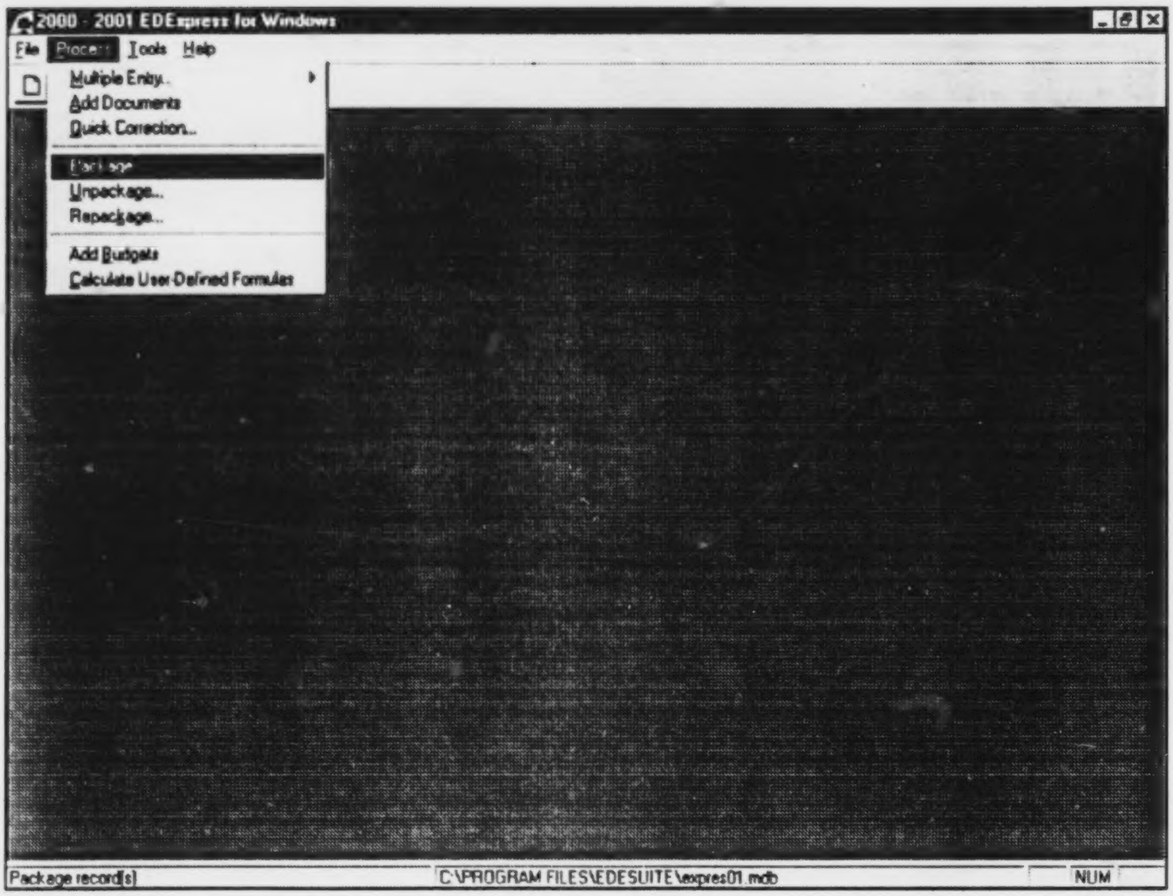
Generally, working with multiple records at one time is the most efficient way to package aid. The Package, Unpackage, and Repackage options of the EDExpress batch Process function allow you to do this. Under Process, you can work with all records or a selection of records from the Packaging database by following the same basic steps as you did when working with an open student record.

[Slide 5-10]

Let's work with a group of first year undergraduates who will live on campus.

Remember: *To be included for Packaging, records must have a Packaging Status of R, U, or H. To be included for repackaging and unpackaging, records must have a Packaging Status of P, H, or M.*

[Slide 5-11]


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Multiple Entry...
Add Documents
Quick Correction...
Package
Unpackage...
Repackage...
Add Budgets
Calculate User-Defined Formulas
Package record(s)
C:\PROGRAM FILES\EDESUITE\expres01.mdb
NUM

The Process/Package function allows you to sort or prioritize the order in which students will be packaged. If you enter a date for the Priority Deadline Date field, EDExpress searches for records that match your Priority Deadline Date Type and includes those that have not passed the date you enter. Then the system sorts the applicable records by date.

Remember: *You set the Priority Deadline Date Type in Packaging System Setup. Valid options include Application Received Date, Transaction Process Date, Ready Date, and User-defined date.*

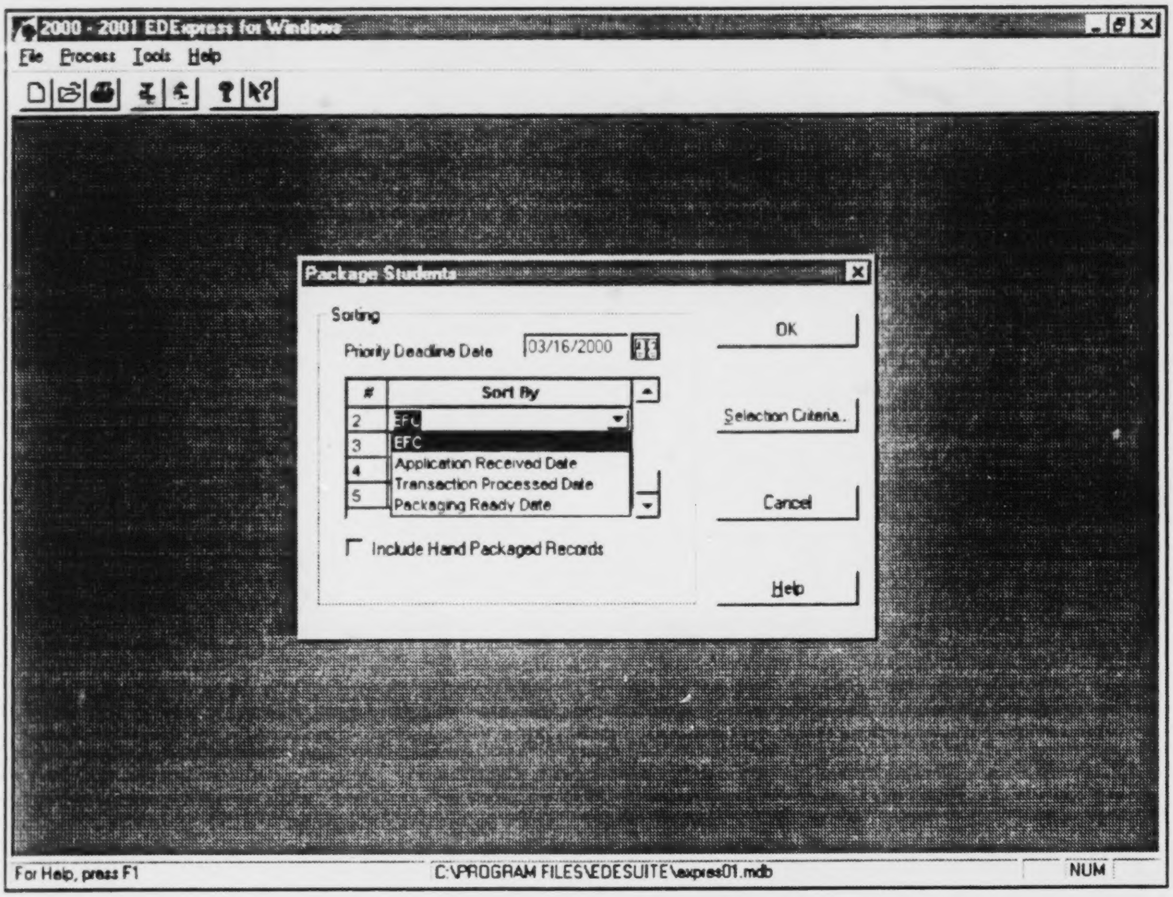
EDExpress allows you up to five more sorting options that can be used with or without the Priority Deadline Date sort. These include sorts by EFC, Application Received Date, Transaction Processed Date, Ready Date, and User-defined Date.

The Package Students dialog box displays

Select priority sort options

*Click the calendar to select the **Priority Deadline Date***

*Click the **Sort By** field to display the drop-down list and select the sort option*



2000 - 2001 EDExpress for Windows

Package Students

Sorting

Priority Deadline Date: 03/16/2000

#	Sort By
2	EFC
3	
4	
5	

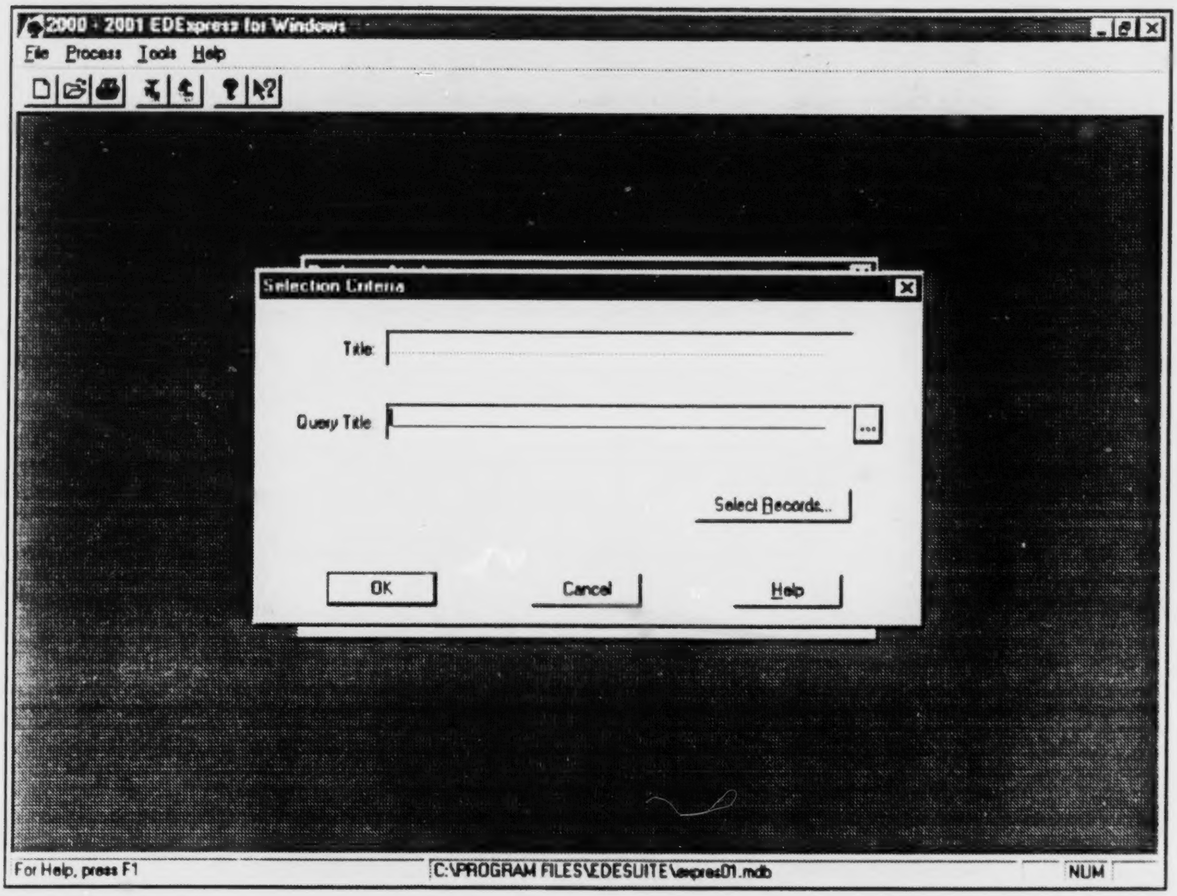
EFC
Application Received Date
Transaction Processed Date
Packaging Ready Date

☐ Include Hand Packaged Records

For Help, press F1
C:\PROGRAM FILES\EDESUITE\express01.mdb
NUM

*Click **Selection Criteria** to specify the group of students you want*

The Selection Criteria dialog box displays


2000 - 2001 EDExpress for Windows
File Process Tools Help
Selection Criteria
Title:
Query Title:
...
Select Records...
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\expres01.mdb
NUM

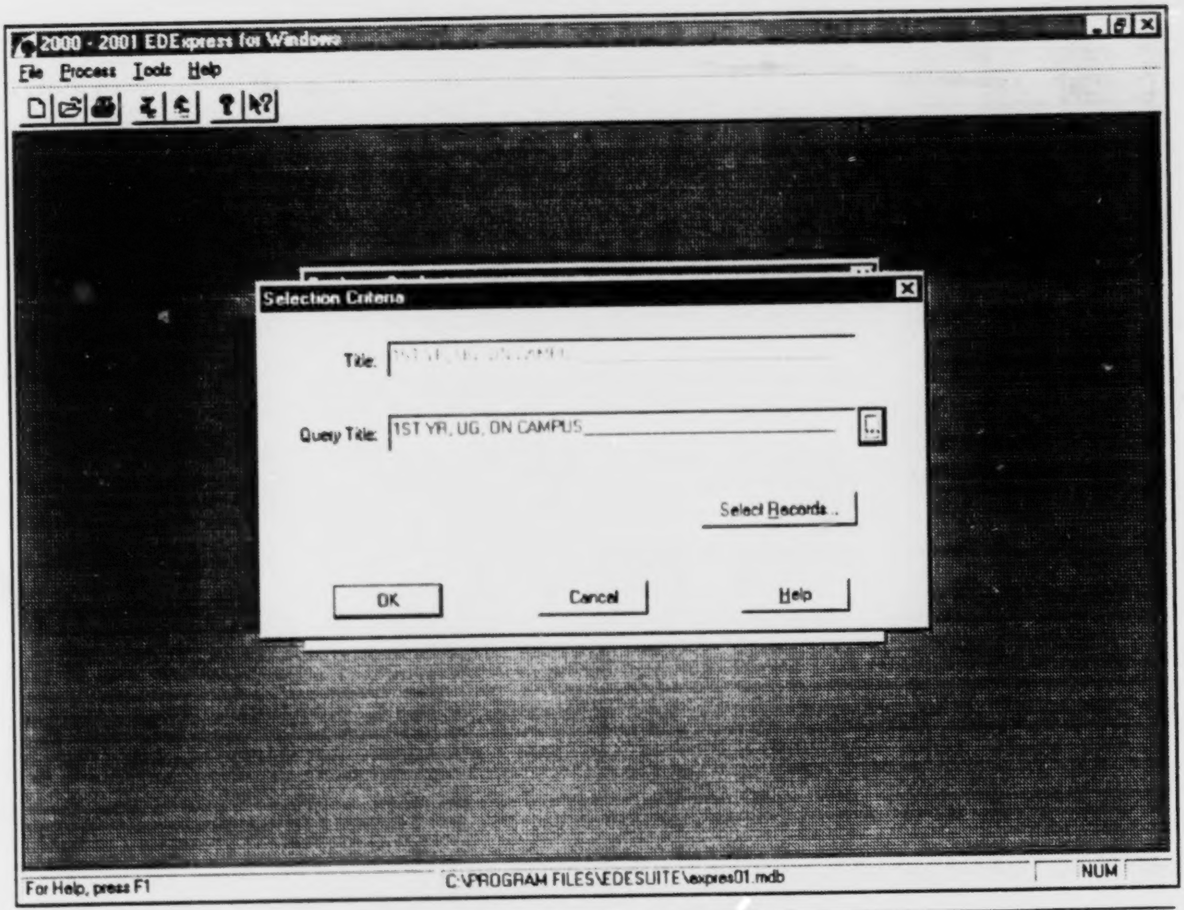
*Click the **ellipsis** button to display a list of available queries in the Packaging database.*

*(Or click **Select Records** to display the records in the database.)*

Select the query title you want.

*Click **OK**.*

*Click **OK** again.*



2000 - 2001 EDExpress for Windows
File Process Tools Help
Selection Criteria
Select Records...
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\expres01.mdb
NUM

Title: 1ST YR, UG, ON CAMPUS

Query Title: 1ST YR, UG, ON CAMPUS

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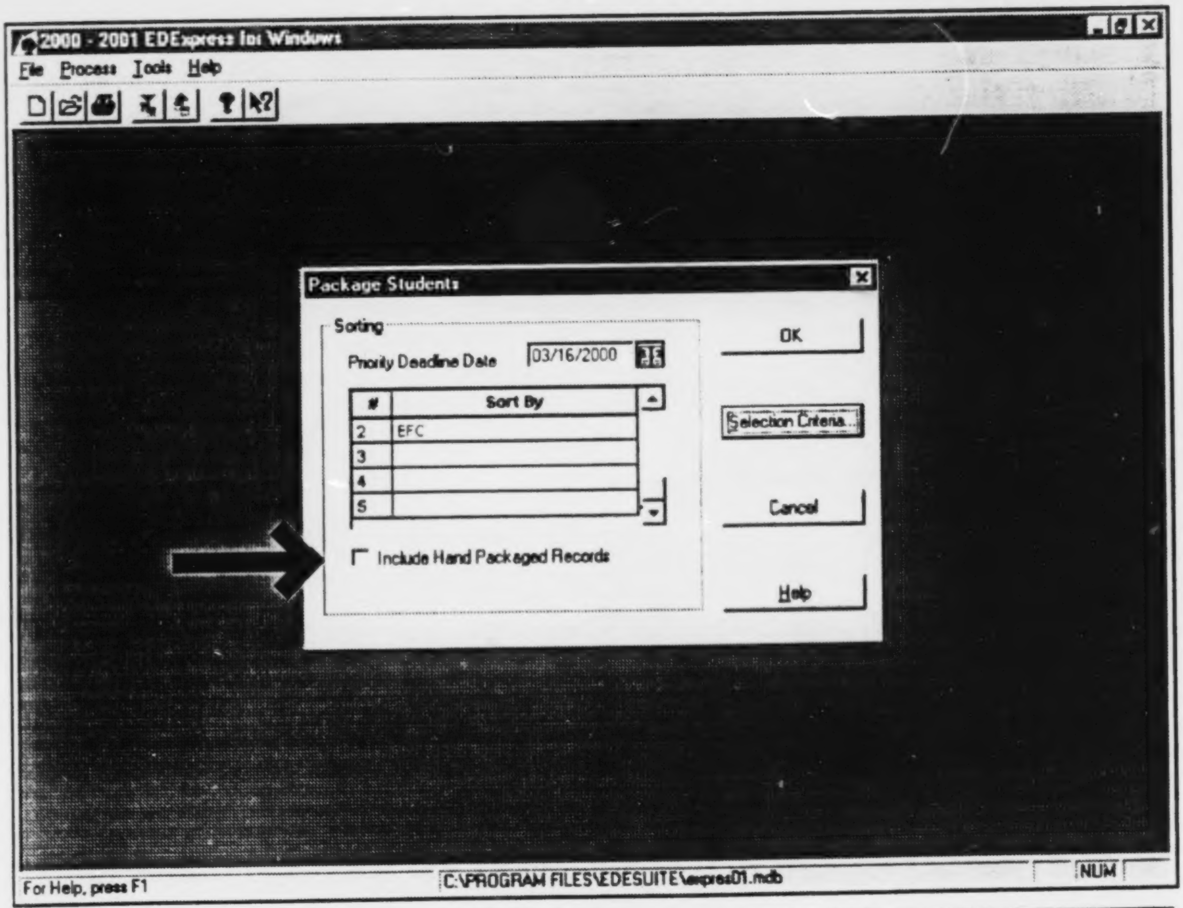
The Package Students dialog box displays

Skip the Include Hand Packaged Students option

*Click **OK** to begin the process*


2000 - 2001 EDExpress for Windows
File Process Tools Help
Package Students
Sorting
OK
Selection Criteria...
Cancel
Help
Sort By
For Help, press F1
NUM

Priority Deadline Date 03/16/2000

#	Sort By
2	EFC
3	
4	
5	

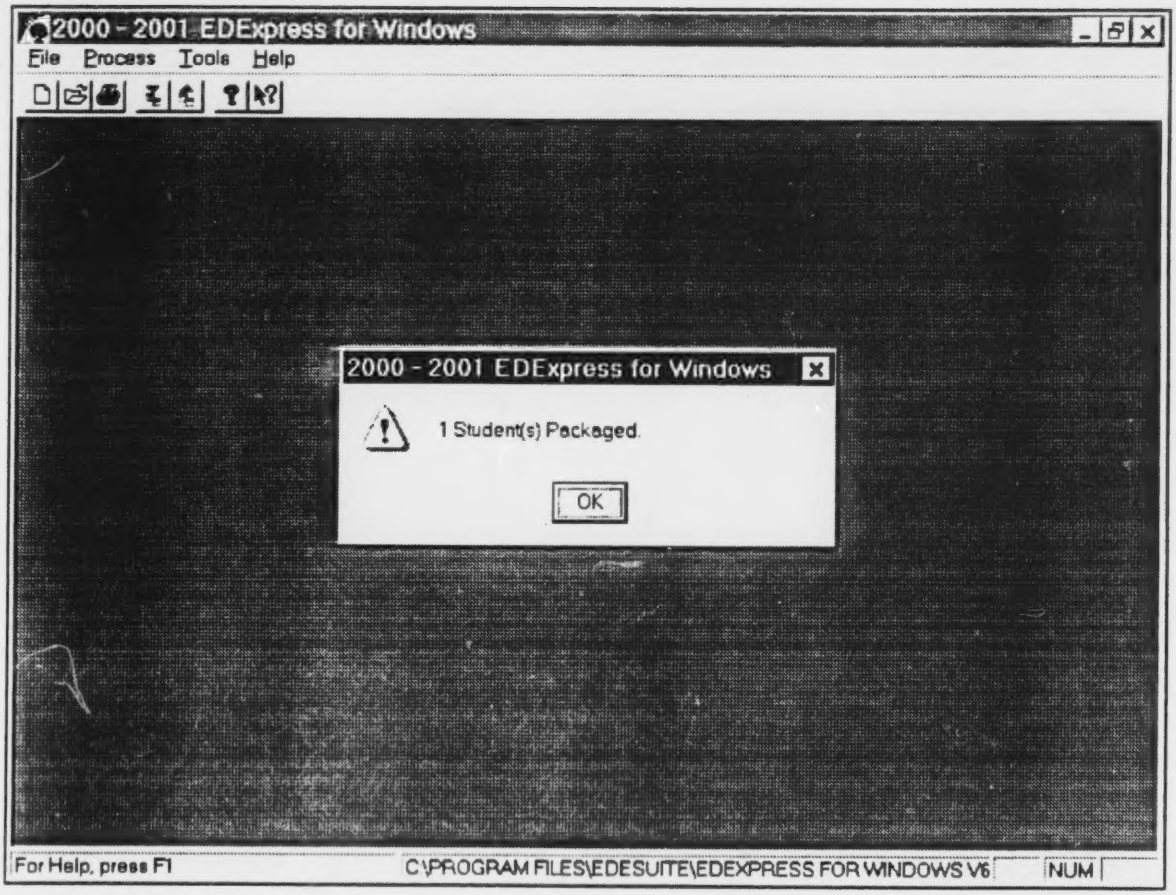
☐ Include Hand Packaged Records

C:\PROGRAM FILES\EDESUITE\expres01.mdb

A processing dialog box displays as the process runs

When complete, another dialog box displays to indicate the number of student records packaged

Click ***OK***



2000 - 2001 EDExpress for Windows

1 Student(s) Packaged.

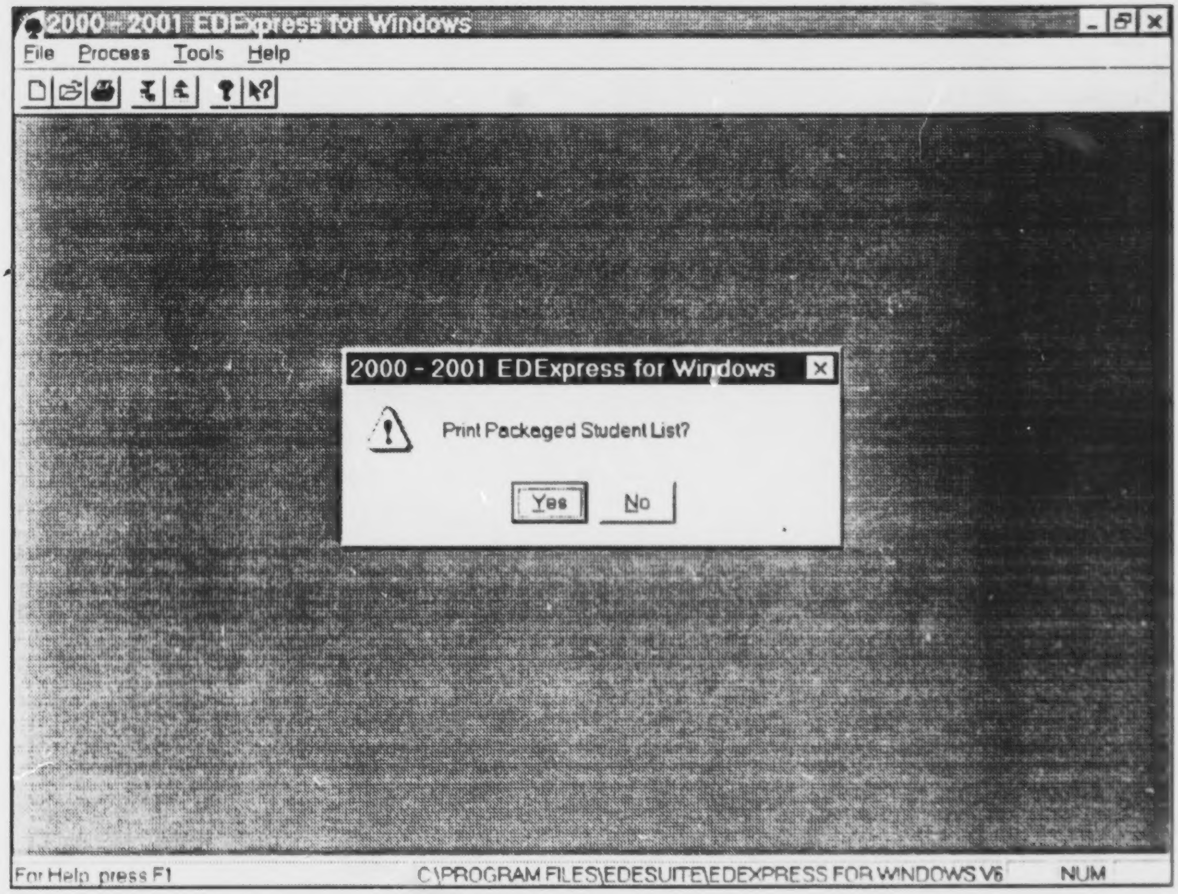
For Help, press F1

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6

2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
OK
NUM

A Print Packaged Student List? dialog box displays.

If you click ***Yes****, a listing of names and Social Security Numbers for the packaged students prints to your printer.*

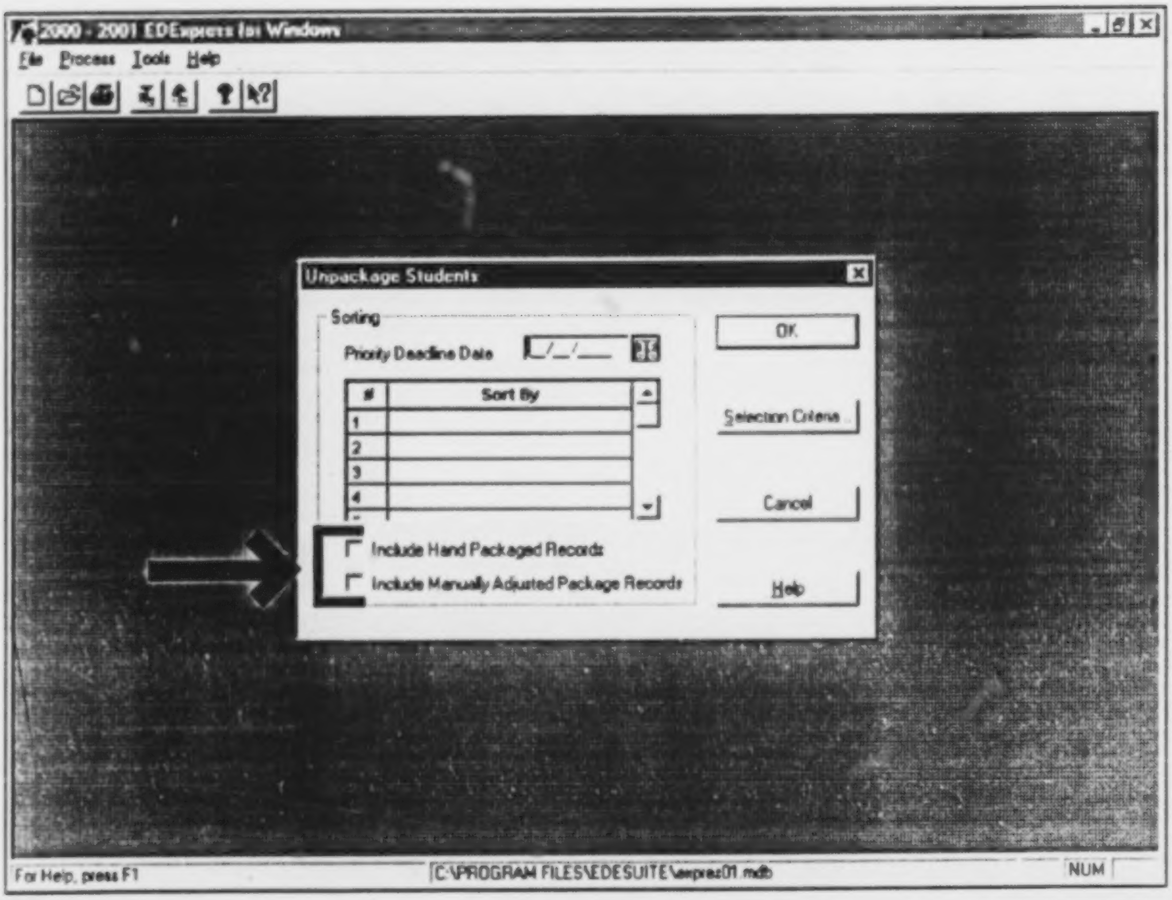


2000 - 2001 EDExpress for Windows
File Process Tools Help
2000 - 2001 EDExpress for Windows
Yes
No
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

Print Packaged Student List?

Unpackage Function: Multiple Records

The process for unpackaging multiple records is similar to the process for packaging multiple records. One difference is that you have the option to include or exclude previously manually adjusted packages and/or hand packaged records.


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Unpackage Students
Sorting
Priority Deadline Date
__/__/____
#
Sort By
1
2
3
4
OK
Selection Criteria...
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\expres01.mdb
NUM

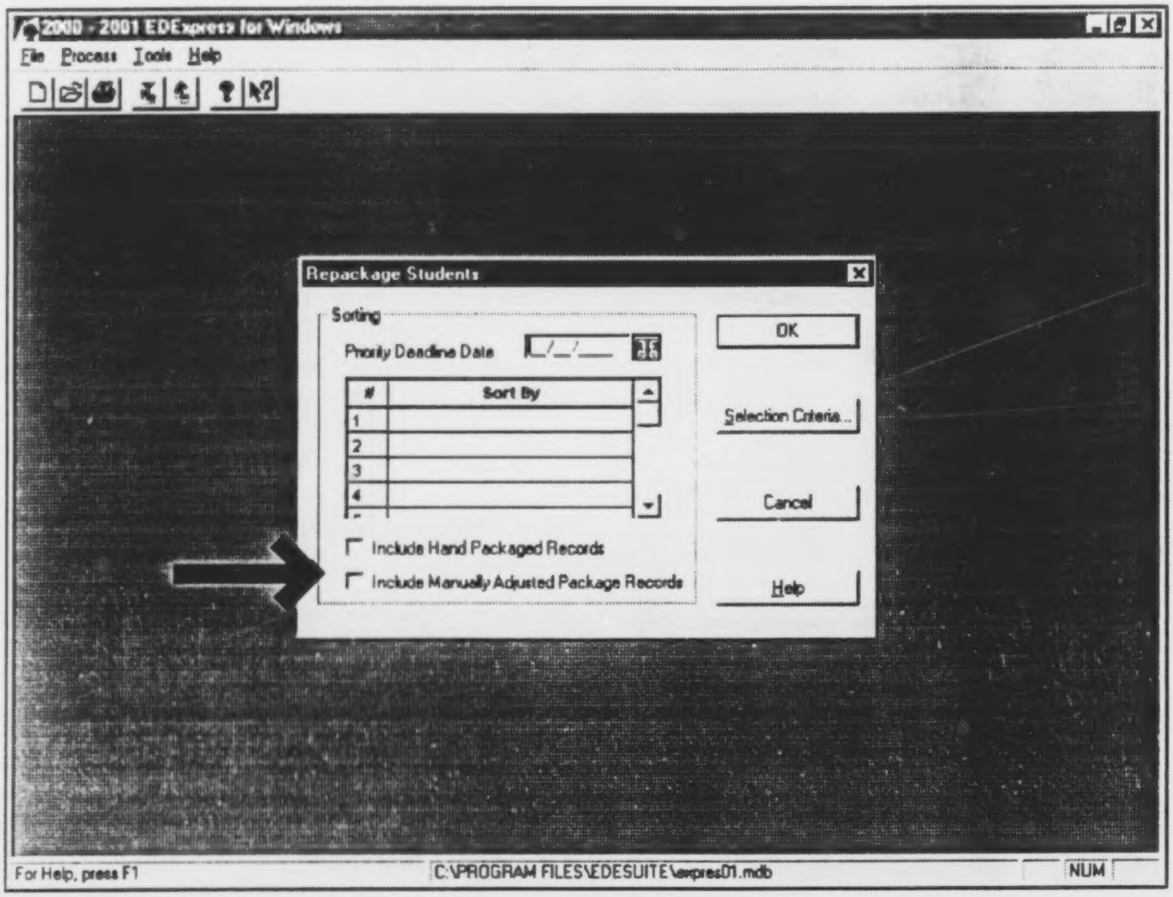
☐ Include Hand Packaged Records
☐ Include Manually Adjusted Package Records

Repackage Function: Multiple Records

The process for repackaging multiple records is similar to the process for packaging multiple records. Just as with the Unpackage function, you have the option to include or exclude manually adjusted packages and/or hand packaged records.

Remember: *This option to exclude previously manually adjusted packages doesn't apply when you repackage an open student record.*

[Slide 5-12]


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Repackage Students
Sorting
Priority Deadline Date
#
Sort By
1
2
3
4
OK
Selection Criteria...
Cancel
Help
NUM

Priority Deadline Date: _/_/__

☐ Include Hand Packaged Records
☐ Include Manually Adjusted Package Records

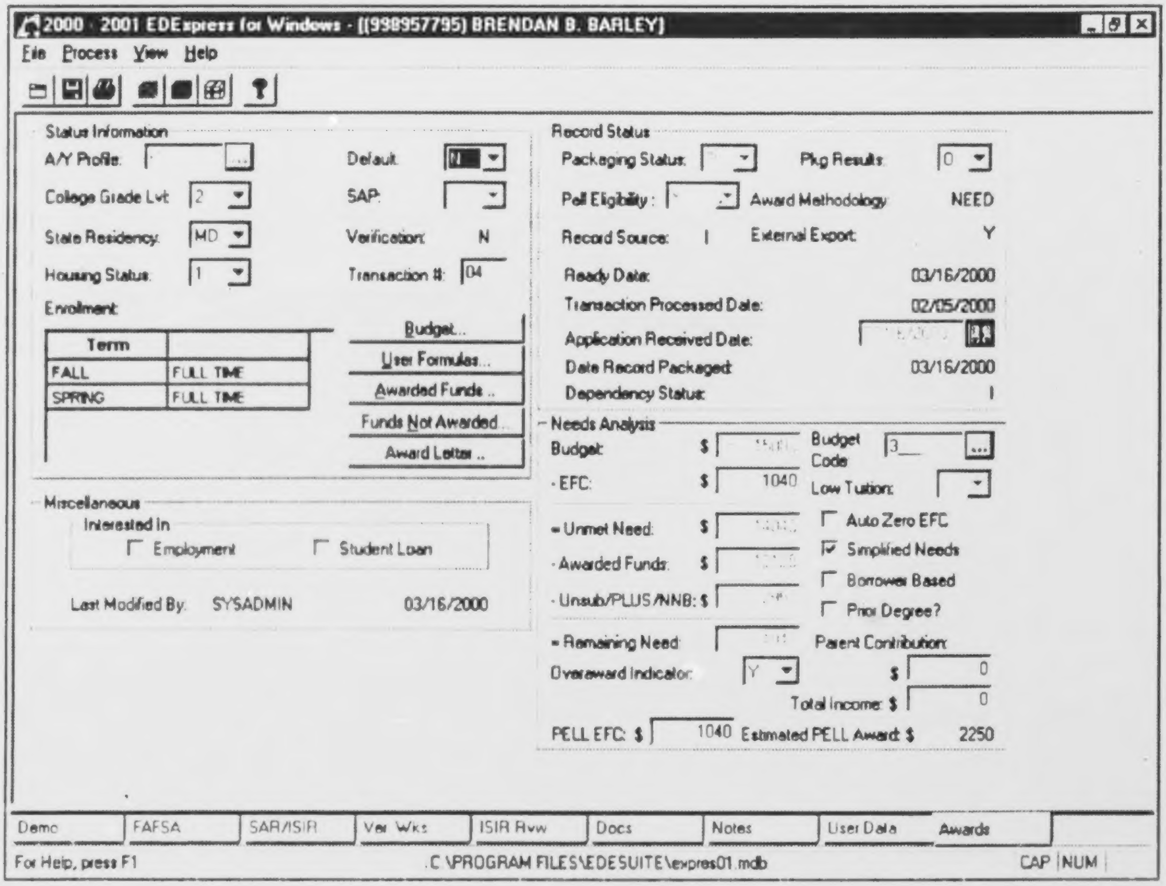
For Help, press F1
C:\PROGRAM FILES\EDESUITE\expres01.mdb

Apply What You Learned

In this exercise you determine if various student records are ready to be packaged. Review all three of the following student records. Complete a Packaging Record Review worksheet for each.

1. Brendan Barley

Note: No documents required for Packaging are outstanding.



2000 - 2001 EDExpress for Windows - [(998957795) BRENDAN B. BARLEY]

File
Process
View
Help
Budget...
User Formulas...
Awarded Funds...
Funds Not Awarded...
Award Letter...
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards
For Help, press F1
CAP
NUM

Status Information

A/Y Profile:
College Grade Lvl: 2
State Residency: MD
Housing Status: 1
Default: N
SAP:
Verification: N
Transaction #: 04

Enrollment:

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous

Interested In
☐ Employment ☐ Student Loan

Last Modified By: SYSADMIN 03/16/2000

Record Status

Packaging Status:
Pkg Results: 0
Pell Eligibility:
Award Methodology: NEED
Record Source: I
External Export: Y
Ready Date: 03/16/2000
Transaction Processed Date: 02/05/2000
Application Received Date:
Date Record Packaged: 03/16/2000
Dependency Status: I

Needs Analysis

Budget: $
- EFC: $ 1040
= Unmet Need: $
- Awarded Funds: $
- Unsub/PLUS/NNB: $
= Remaining Need:
Overaward Indicator: Y
Budget Code: 3
Low Tuition:
☐ Auto Zero EFC
☑ Simplified Needs
☐ Borrower Based
☐ Prior Degree?
Parent Contribution: $ 0
Total Income: $ 0
PELL EFC: $ 1040
Estimated PELL Award: $ 2250

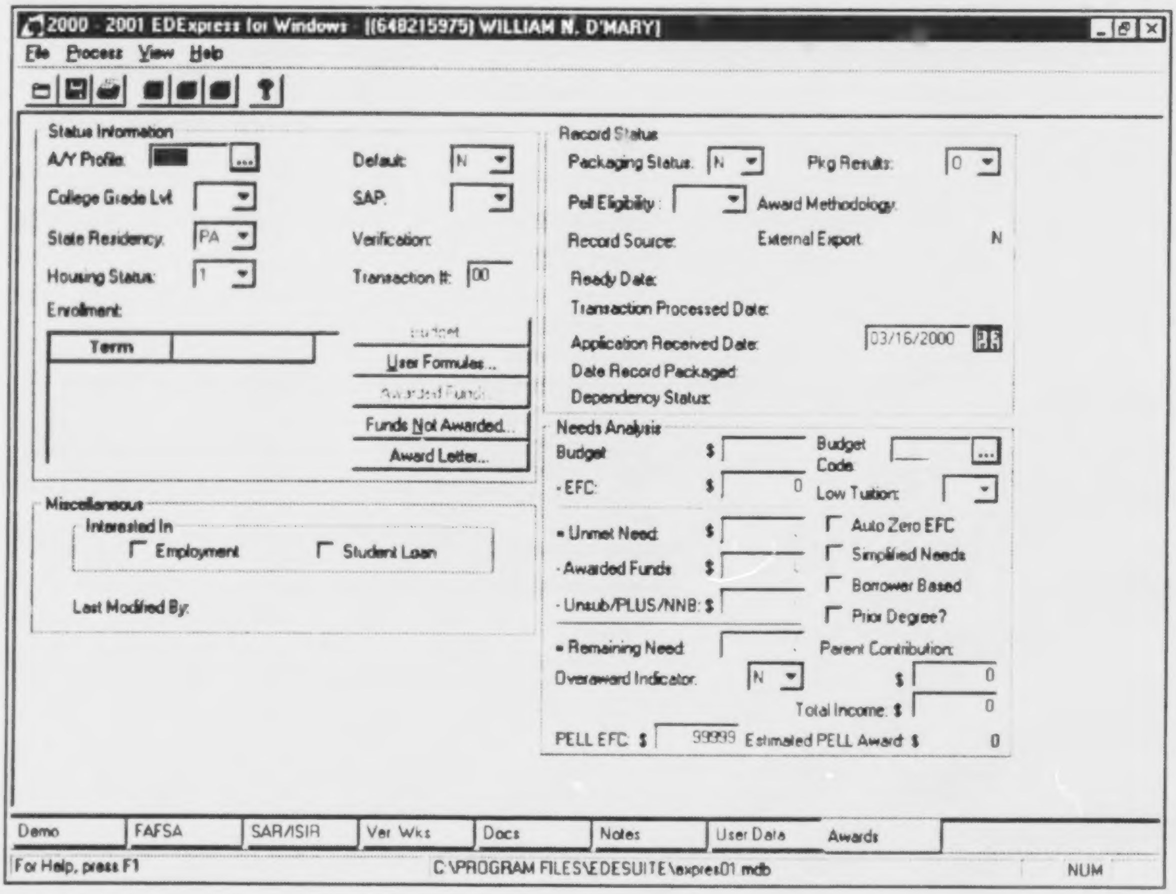
C:\PROGRAM FILES\EDESUITE\expres01.mdb

Packaging Record Review Worksheet

Student Name:	
How was the Packaging record created?	
How do you know?	
Has the record been packaged?	Yes ☐ No ☐
How do you know?	
If the record has been packaged, how much aid was awarded?	
How do you know?	
If the record has not packaged, is it ready to be packaged?	Yes ☐ No ☐
How do you know? What date did it become ready?	
If the record is not ready to be packaged, what needs to be done to update it to ready?	
If the record is ready to package, should you include Work-Study and/or student loans?	Yes ☐ No ☐
How do you know?	

2. William D'Mary

Note: No documents required for Packaging are outstanding


File
Process
View
Help
Budget
User Formulas...
Awarded Funds
Funds Not Awarded...
Award Letter...
Demo
FAFSA
SAR/ISIR
Ver Wks
Docs
Notes
User Data
Awards

2000 - 2001 EDExpress for Windows - [(648215975) WILLIAM N. D'MARY]

Status Information
A/Y Profile:
Default: N
College Grade Lvl:
SAP:
State Residency: PA
Verification:
Housing Status: 1
Transaction #: 00
Enrollment:

Term	

Miscellaneous
Interested In
☐ Employment ☐ Student Loan
Last Modified By:

Record Status
Packaging Status: N
Pkg Results: 0
Pell Eligibility:
Award Methodology:
Record Source: External Export N
Ready Date:
Transaction Processed Date:
Application Received Date: 03/16/2000
Date Record Packaged:
Dependency Status:

Needs Analysis
Budget $
Budget Code
- EFC: $ 0
Low Tuition:
= Unmet Need: $
- Awarded Funds: $
- Unsub/PLUS/NNB: $
= Remaining Need:
Overaward Indicator: N
☐ Auto Zero EFC
☐ Simplified Needs
☐ Borrower Based
☐ Prior Degree?
Parent Contribution: $ 0
Total Income: $ 0
PELL EFC: $ 99999
Estimated PELL Award: $ 0

For Help, press F1
C:\PROGRAM FILES\EDESUITE\expres01.mdb
NUM

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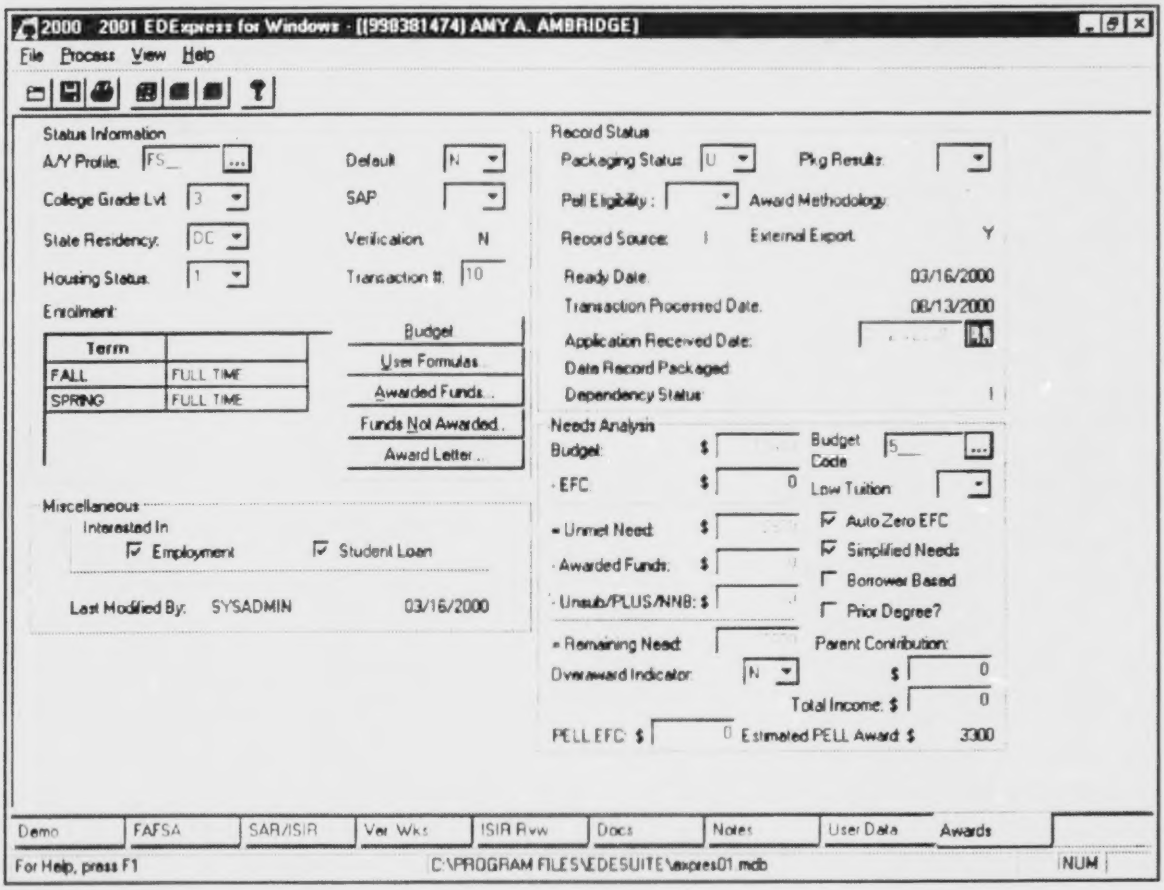
Packaging Record Review Worksheet

Student Name:	
How was the Packaging record created?	
How do you know?	
Has the record been packaged?	Yes ☐ No ☐
How do you know?	
If the record has been packaged, how much aid was awarded?	
How do you know?	
If the record has not packaged, is it ready to be packaged?	Yes ☐ No ☐
How do you know? What date did it become ready?	
If the record is not ready to be packaged, what needs to be done to update it to ready?	
If the record is ready to package, should you include Work-Study and/or student loans?	Yes ☐ No ☐
How do you know?	

3. Amy Ambridge

Note: No documents required for Packaging are outstanding


File
Process
View
Help
Budget
User Formulas...
Awarded Funds...
Funds Not Awarded...
Award Letter...
Demo
FAFSA
SAR/ISIR
Ver Wks
ISIR Rvw
Docs
Notes
User Data
Awards
For Help, press F1
NUM

2000 - 2001 EDExpress for Windows - [(998381474) AMY A. AMBRIDGE]

Status Information

A/Y Profile: FS_

Default: N

College Grade Lvl: 3

SAP:

State Residency: DC

Verification: N

Housing Status: 1

Transaction #: 10

Enrollment:

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous

Interested In

☑ Employment ☑ Student Loan

Last Modified By: SYSADMIN 03/16/2000

Record Status

Packaging Status: U

Pkg Results:

Pell Eligibility:

Award Methodology:

Record Source: I

External Export: Y

Ready Date: 03/16/2000

Transaction Processed Date: 08/13/2000

Application Received Date:

Date Record Packaged:

Dependency Status: I

Needs Analysis

Budget: $

Budget Code: 5_

- EFC: $ 0

Low Tuition:

= Unmet Need: $

☑ Auto Zero EFC

- Awarded Funds: $

☑ Simplified Needs

☐ Borrower Based

- Unsub/PLUS/NNB: $

☐ Prior Degree?

= Remaining Need:

Parent Contribution: $ 0

Overaward Indicator: N

Total Income: $ 0

PELL EFC: $ 0

Estimated PELL Award: $ 3300

C:\PROGRAM FILES\EDESUITE\expres01.mdb

403

Packaging Record Review Worksheet

Student Name:	
How was the Packaging record created?	
How do you know?	
Has the record been packaged?	Yes ☐ No ☐
How do you know?	
If the record has been packaged, how much aid was awarded?	
How do you know?	
If the record has not packaged, is it ready to be packaged?	Yes ☐ No ☐
How do you know? What date did it become ready?	
If the record is not ready to be packaged, what needs to be done to update it to ready?	
If the record is ready to package, should you include Work-Study and/or student loans?	Yes ☐ No ☐
How do you know?	

Working with Award Letters

After packaging students, award letters must be generated and printed. Also, depending on the type of default award letter (Offer or Notification) you select in Packaging System Setup, you may need to track the student's return/acceptance of the award letter. EDExpress gives you several options to batch generate award letters for the students you package.

- **Address**—Allows you to select which address—local or permanent—to print on the letter
- **Sort Order**—Allows you to sort the batch by last name, Social Security Number, or zip code
- **Acceptance Date**—Required field for Offer letters that indicates the deadline date by which the student is to accept the financial aid award
- **Exclude Heading from Letter?**—Excludes the letter name and academic year, which print centered at the top of page
- **Exclude Records with Award Letters Received?**—When generating multiple letters, this option allows you to exclude award letters already marked as received in the students' records
- **Exclude Needs Analysis?**—Excludes the needs analysis from printing on the award letter
- **Print User Defined Text?**—Includes the additional text you created in the Global System Setup up as a cover page to the award letter
- **Print Missing Documents?**—Includes a third page that advises students that the award letter is an offer until the documents listed as missing or incomplete are received
- **Exclude Signature?**—Allows you to exclude the system-defined closing at the bottom of the letter (i.e., Sincerely, Financial Aid Administrator)
- **Print School Name/Address?**—Allows you to include your school's name and address at the upper right side of the page

Select the options that best fit the student population for which letters are being generated.

[Slide 5-14 through 5-16]

Generating Multiple Award Letters

To generate and print award letters

*Select **File/Print** on the main menu bar*

The Print dialog box displays

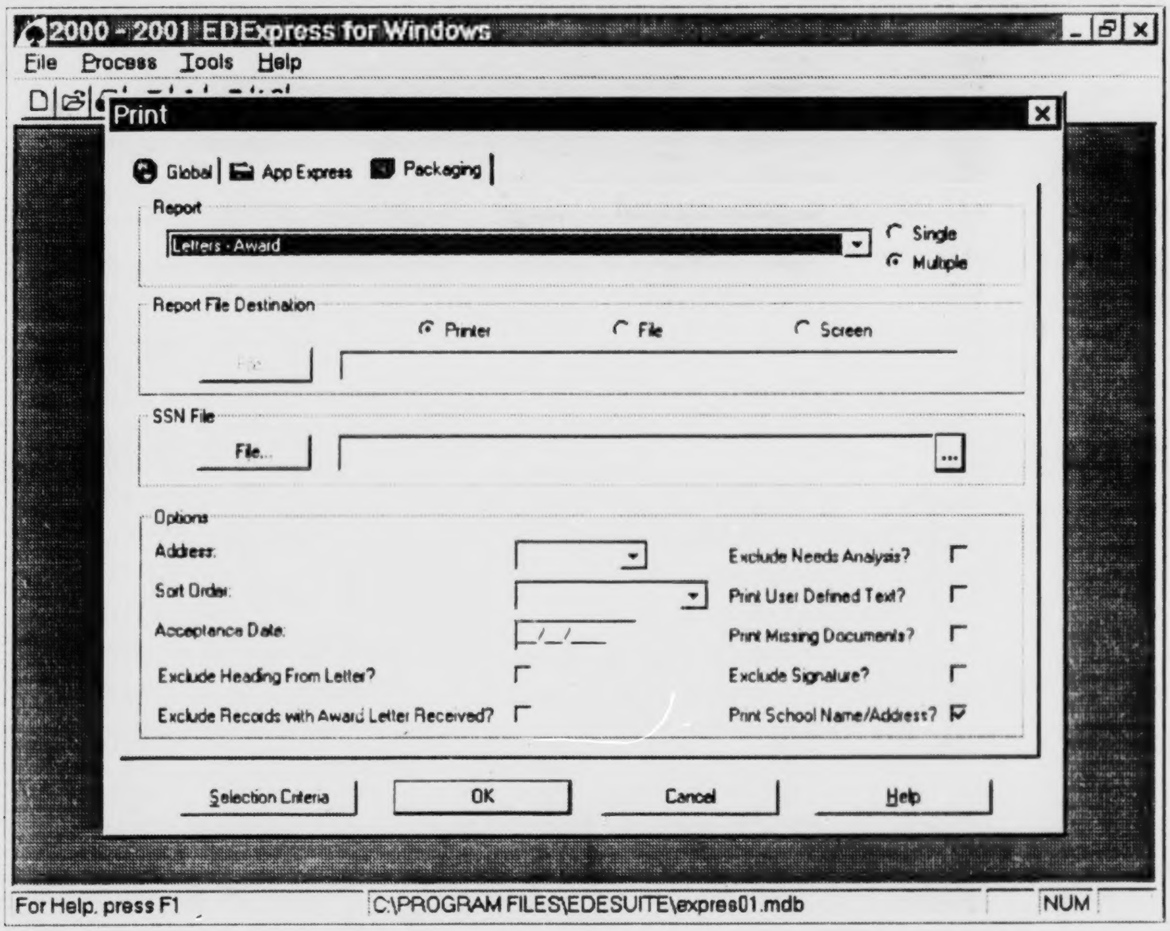
*Click the **Packaging** tab*

*Under Report, select **Letters-Award***

Generating and printing award letters takes planning. Keep in mind your goal as you plan the process. It may be more efficient for you to batch generate award letters according to student populations. For example, because you would not want to include the needs analysis on the award letters of those students who will not file the FASFA, you might want to generate their letters separately.

To generate letters for students who will not file the FASFA separately from those who have, simply create a parameter query that lets you select on the field Record Source. This allows you to use the same query for either population.

The following example demonstrates how to generate and print a batch of award letters for a student population selected by a parameter query created in the Packaging database.



Report: Letters - Award

○ Single
● Multiple

Report File Destination:
● Printer
○ File
○ Screen

SSN File: File...

Options:

Address:
Sort Order:
Acceptance Date: __/__/__
Exclude Heading From Letter? ☐
Exclude Records with Award Letter Received? ☐
Exclude Needs Analysis? ☐
Print User Defined Text? ☐
Print Missing Documents? ☐
Exclude Signature? ☐
Print School Name/Address? ☑

Selection Criteria

C:\PROGRAM FILES\EDESUITE\expres01.mdb

Remember: *The Acceptance Date is a required field for Offer letters, but is not used with Notification letters.*

*Click **Multiple** to print letters for more than one student.*

*Click **Screen** as the Report File Destination to view the letters on the screen.*

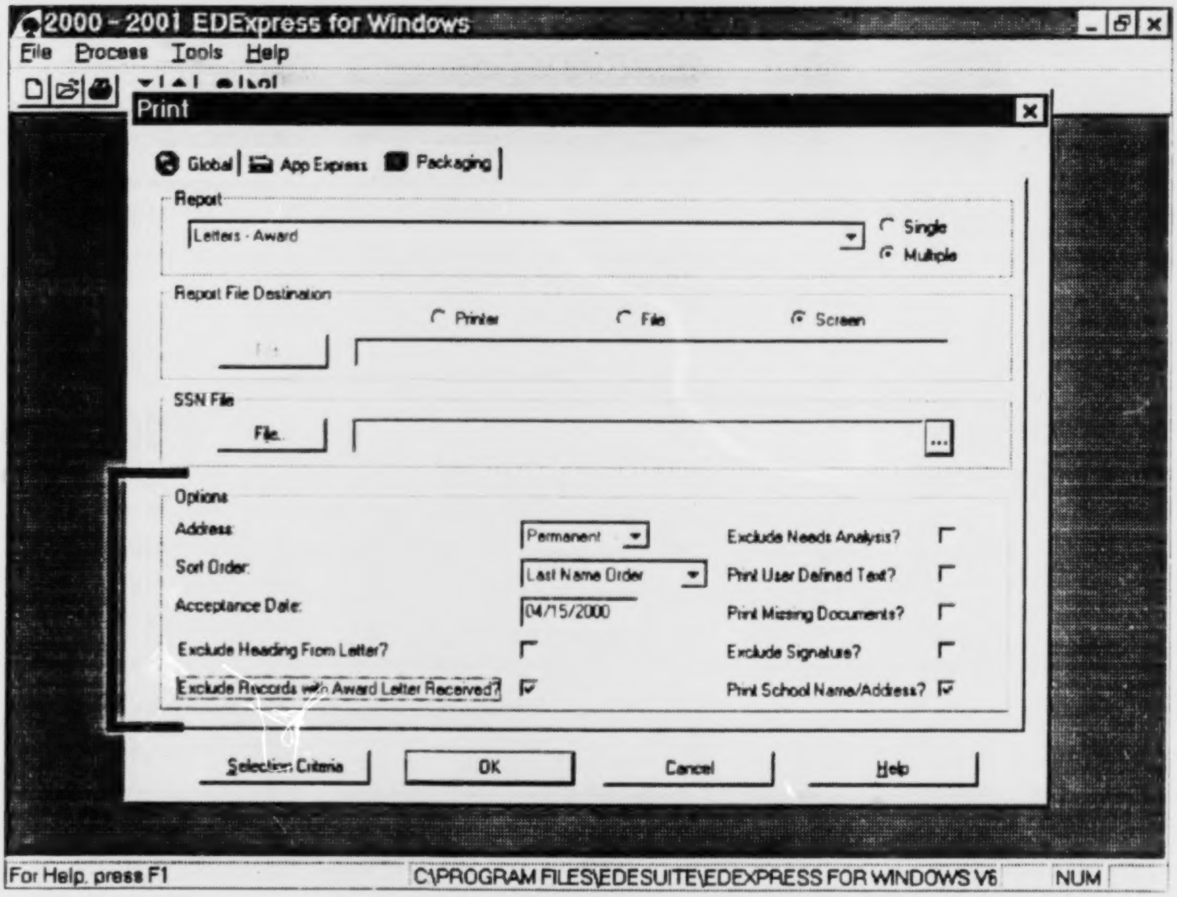
*Click the **Address** down arrow and select **Permanent** to print the student's home address.*

*Click the **Sort Order** down arrow. Select **Last Name Order** to generate letters in alphabetical order.*

Enter the Acceptance Date by which the students in this batch should accept their financial aid awards.

Skip Exclude Heading From Letter? checkbox.

*Click **Exclude Records with Awards Letters Received?** checkbox.*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Print
Global
App Express
Packaging
File...
Selection Criteria
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

Report: Letters - Award
○ Single
● Multiple

Report File Destination
○ Printer ○ File ● Screen

SSN File

Options
Address: Permanent
Sort Order: Last Name Order
Acceptance Date: 04/15/2000
Exclude Heading From Letter? ☐
Exclude Records with Award Letter Received? ☑
Exclude Needs Analysis? ☐
Print User Defined Text? ☐
Print Missing Documents? ☐
Exclude Signature? ☐
Print School Name/Address? ☑

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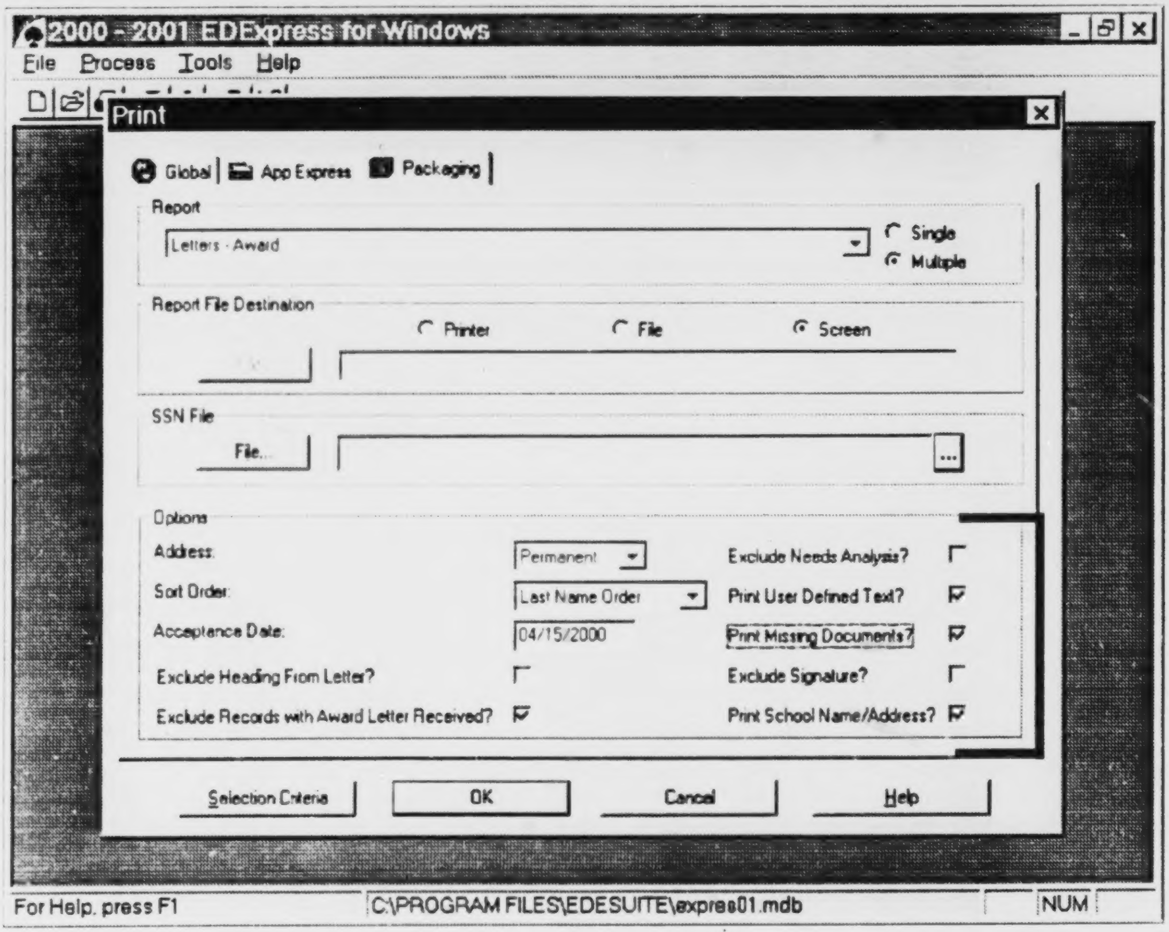
Skip Exclude Needs Analysis? checkbox

Click ***Print User Defined Text?*** *checkbox*

Click ***Print Missing Documents?*** *checkbox*

Skip Exclude Signature? checkbox

Click ***Print School Name/Address*** *checkbox*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Print
Global
App Express
Packaging
Report
Report File Destination
SSN File
File...
Options
Selection Criteria
OK
Cancel
Help

Report: Letters - Award
○ Single
● Multiple

Report File Destination: ○ Printer ○ File ● Screen

Address: Permanent
Sort Order: Last Name Order
Acceptance Date: 04/15/2000
Exclude Heading From Letter? ☐
Exclude Records with Award Letter Received? ☑
Exclude Needs Analysis? ☐
Print User Defined Text? ☑
Print Missing Documents? ☑
Exclude Signature? ☐
Print School Name/Address? ☑

For Help, press F1
C:\PROGRAM FILES\EDESUITE\expres01.mdb
NUM

Remember: *This parameter query selects students according to how their packaging records were created In this example, the needs analysis will be included only on award letters of students having ISIR records*

Click **Selection Criteria**

Click **Query Title**

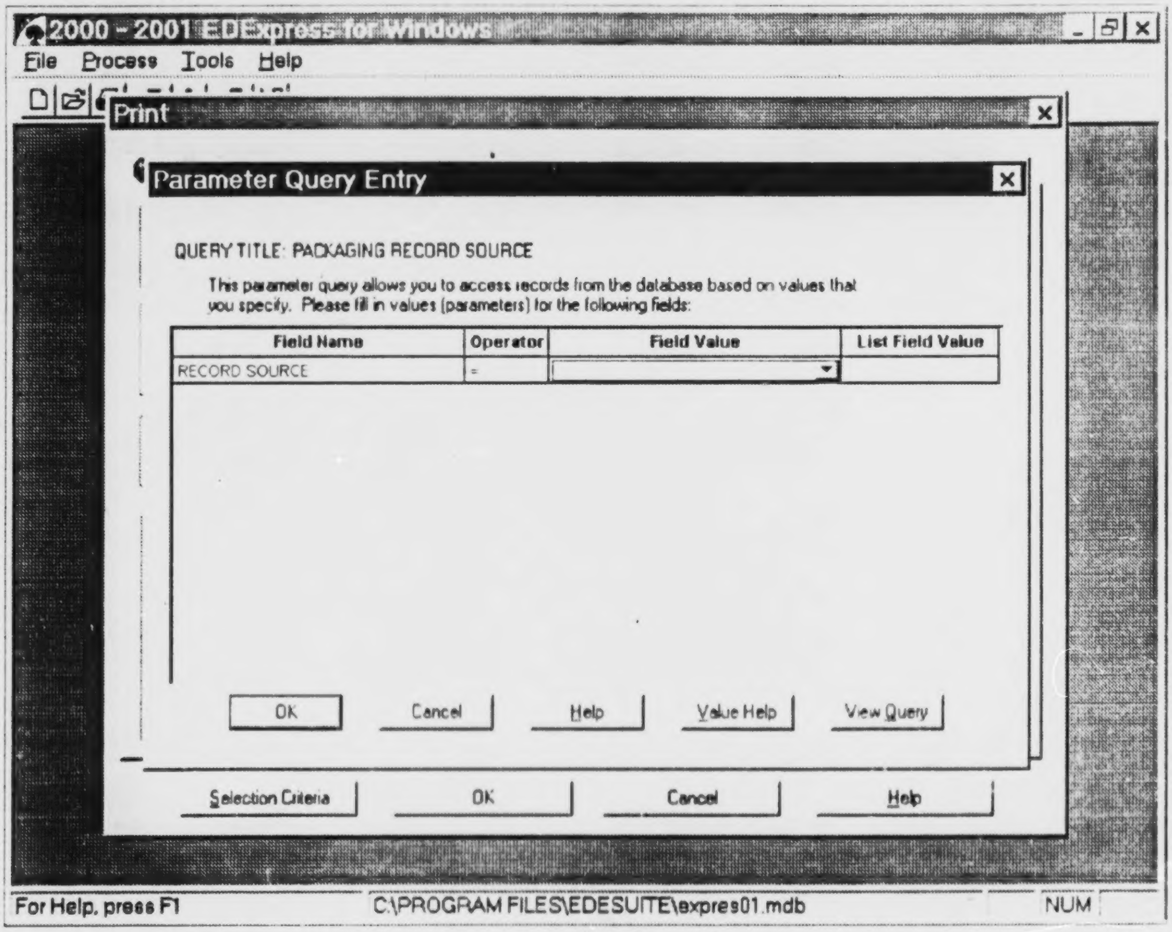
Select/highlight **Packaging Record Source**

Click **OK**

The Selection Criteria dialog box displays

Click **OK**

The Parameter Query Entry dialog box displays


2000 - 2001 EDExpress for Windows
File Process Tools Help
Print
Parameter Query Entry
OK
Cancel
Help
Value Help
View Query
Selection Criteria
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\expres01.mdb
NUM

QUERY TITLE: PACKAGING RECORD SOURCE

This parameter query allows you to access records from the database based on values that you specify. Please fill in values (parameters) for the following fields:

Field Name	Operator	Field Value	List Field Value
RECORD SOURCE	=		

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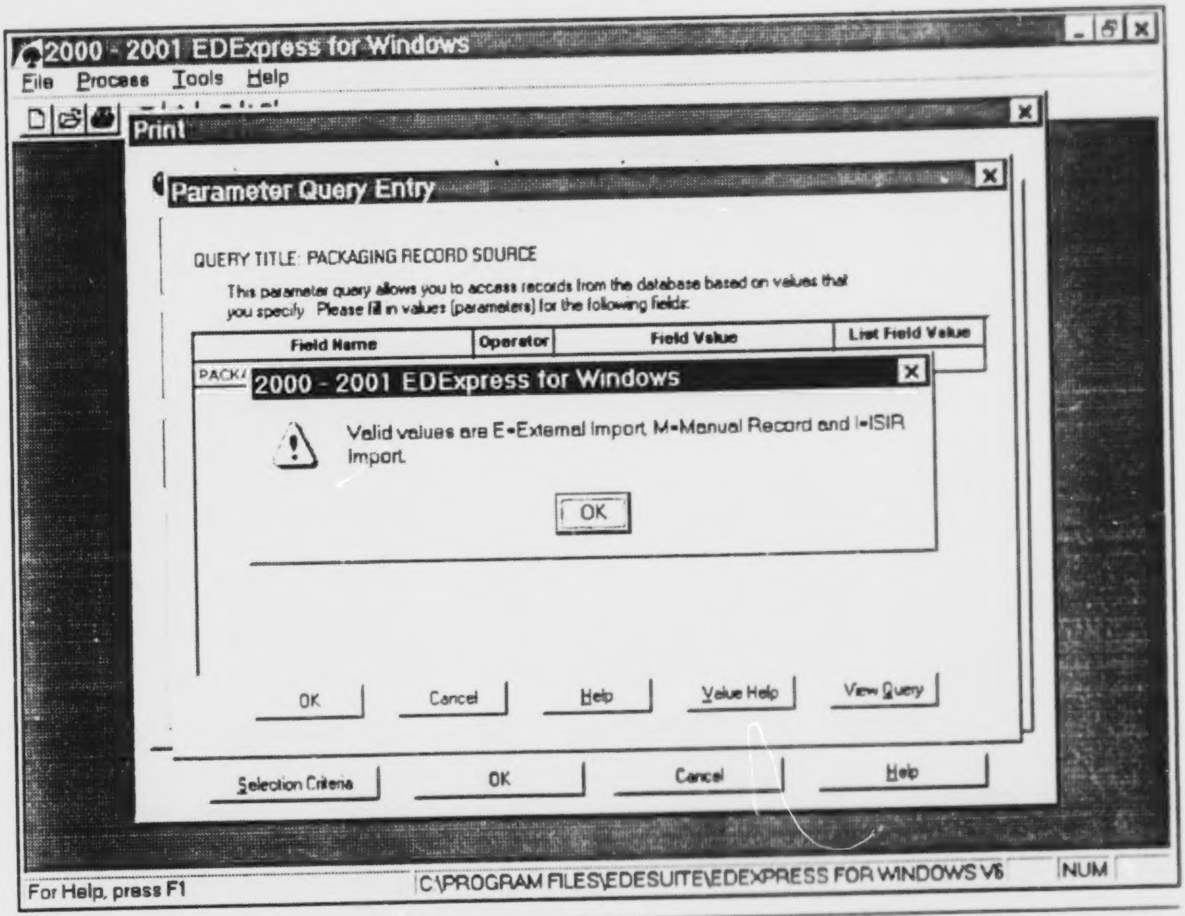
Click the ***Value Help*** *button to display valid values for the field Record Source*


2000 - 2001 EDExpress for Windows
File Process Tools Help
Print
Parameter Query Entry
Field Name
Operator
Field Value
List Field Value
PACK/
2000 - 2001 EDExpress for Windows
OK
OK
Cancel
Help
Value Help
View Query
Selection Criteria
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

QUERY TITLE: PACKAGING RECORD SOURCE

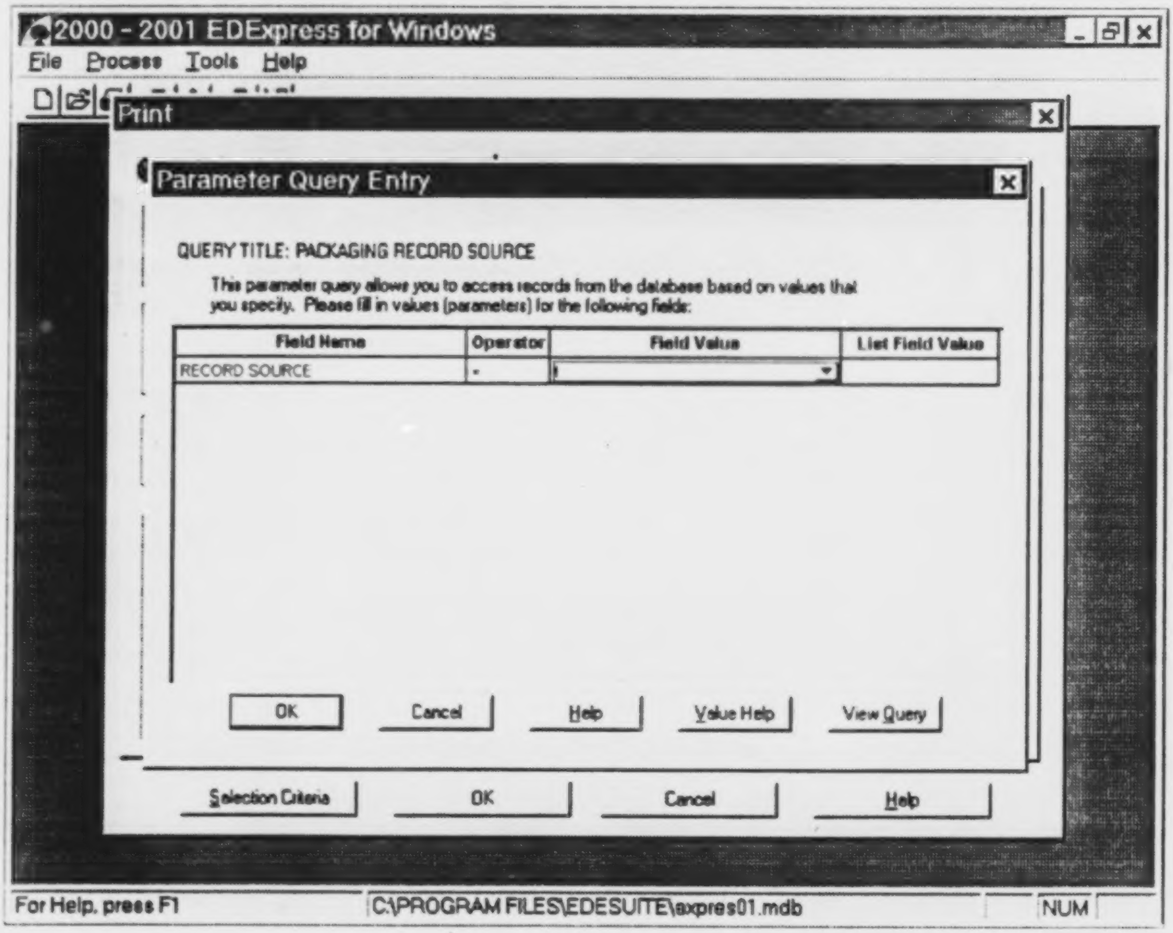
This parameter query allows you to access records from the database based on values that you specify. Please fill in values (parameters) for the following fields:

Valid values are E=External Import, M=Manual Record and I=ISIR Import.

*Click the **Field Value** down arrow*

*Select **I** for an ISIR Record Source*

*Click **OK***


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Print
Parameter Query Entry
OK
Cancel
Help
Value Help
View Query
Selection Criteria
OK
Cancel
Help

QUERY TITLE: PACKAGING RECORD SOURCE

This parameter query allows you to access records from the database based on values that you specify. Please fill in values (parameters) for the following fields:

Field Name	Operator	Field Value	List Field Value
RECORD SOURCE	=	I	

For Help, press F1

C:\PROGRAM FILES\EDESUITE\expres01.mdb

NUM

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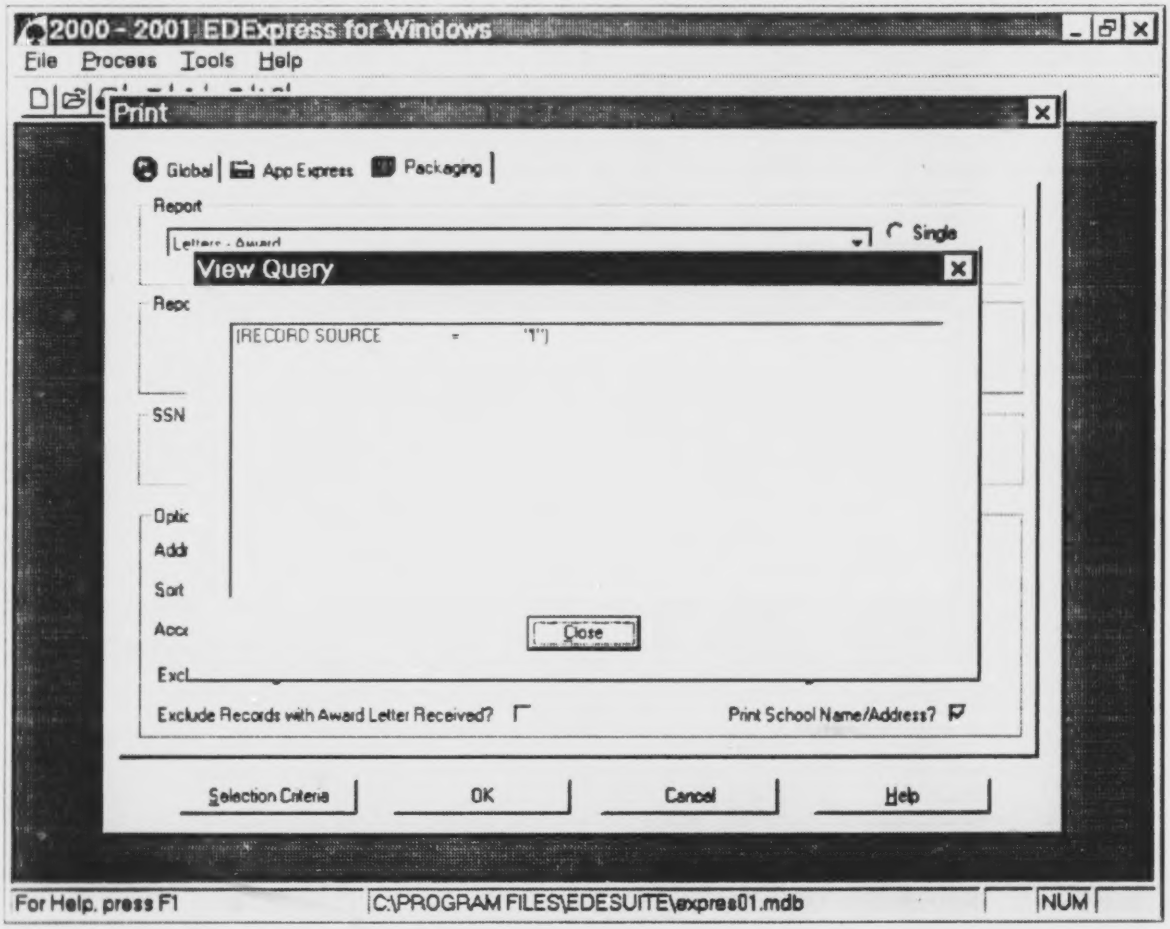
The View Query dialog box displays

Click ***Close***


2000 - 2001 EDExpress for Windows
File Process Tools Help
Print
Global
App Express
Packaging
Report
Letters - Award
Single
View Query
Repc
SSN
Optic
Addr
Sort
Acco
Excl
Close
Exclude Records with Award Letter Received? ☐
Print School Name/Address? ☑
Selection Criteria
OK
Cancel
Help
For Help, press F1
C:\PROGRAM FILES\EDESUITE\expres01.mdb
NUM

```
(RECORD SOURCE        =        '1')
```

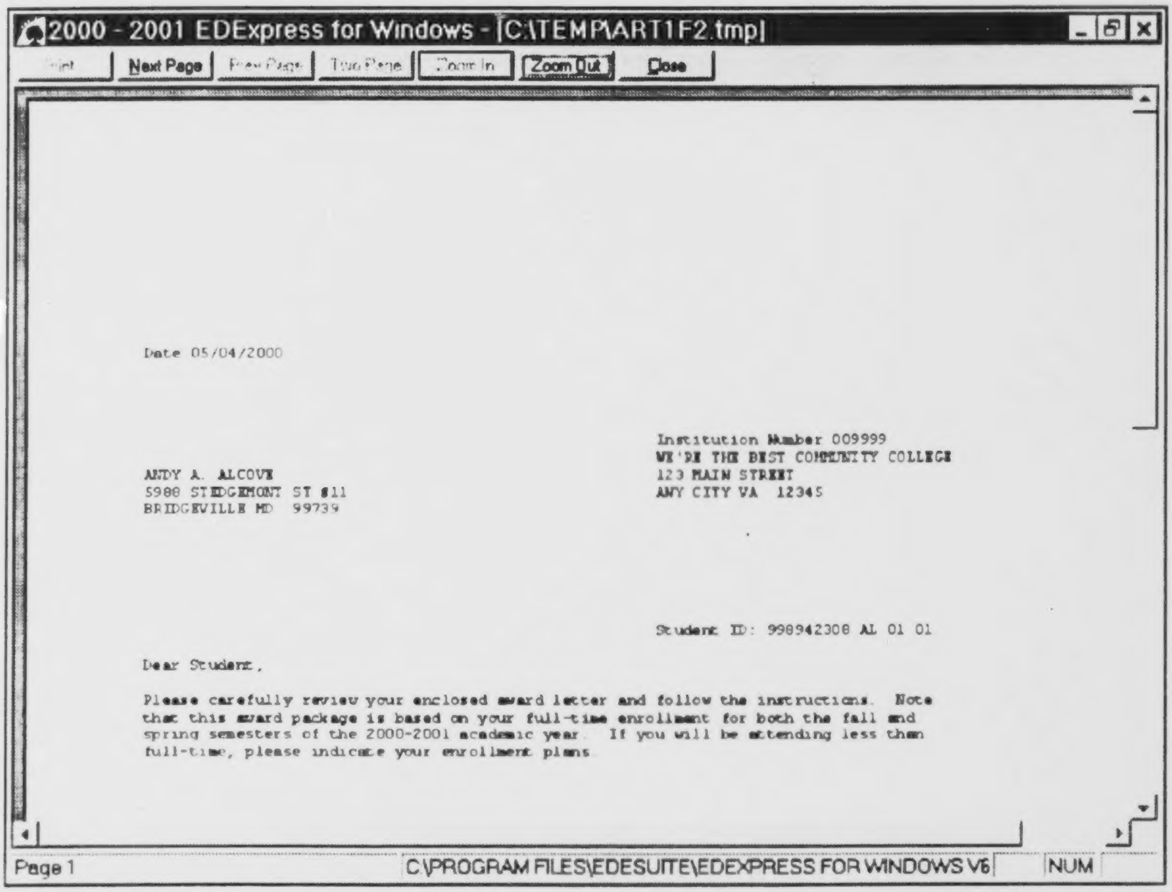
The letters display on screen. For the records included in the batch, all pages of the award letters generate consecutively in the following order:

1. Additional text you created
2. Award letter
3. Missing documents page

The Print dialog box displays again.

*Click **OK** to generate the letters.*

The additional text you created displays as the first page.


2000 - 2001 EDExpress for Windows - [C:\TEMP\ART1F2.tmp]
Print
Next Page
Prev Page
Two Page
Zoom In
Zoom Out
Close
Page 1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

Date 05/04/2000

Institution Number 009999
WE'RE THE BEST COMMUNITY COLLEGE
123 MAIN STREET
ANY CITY VA 12345

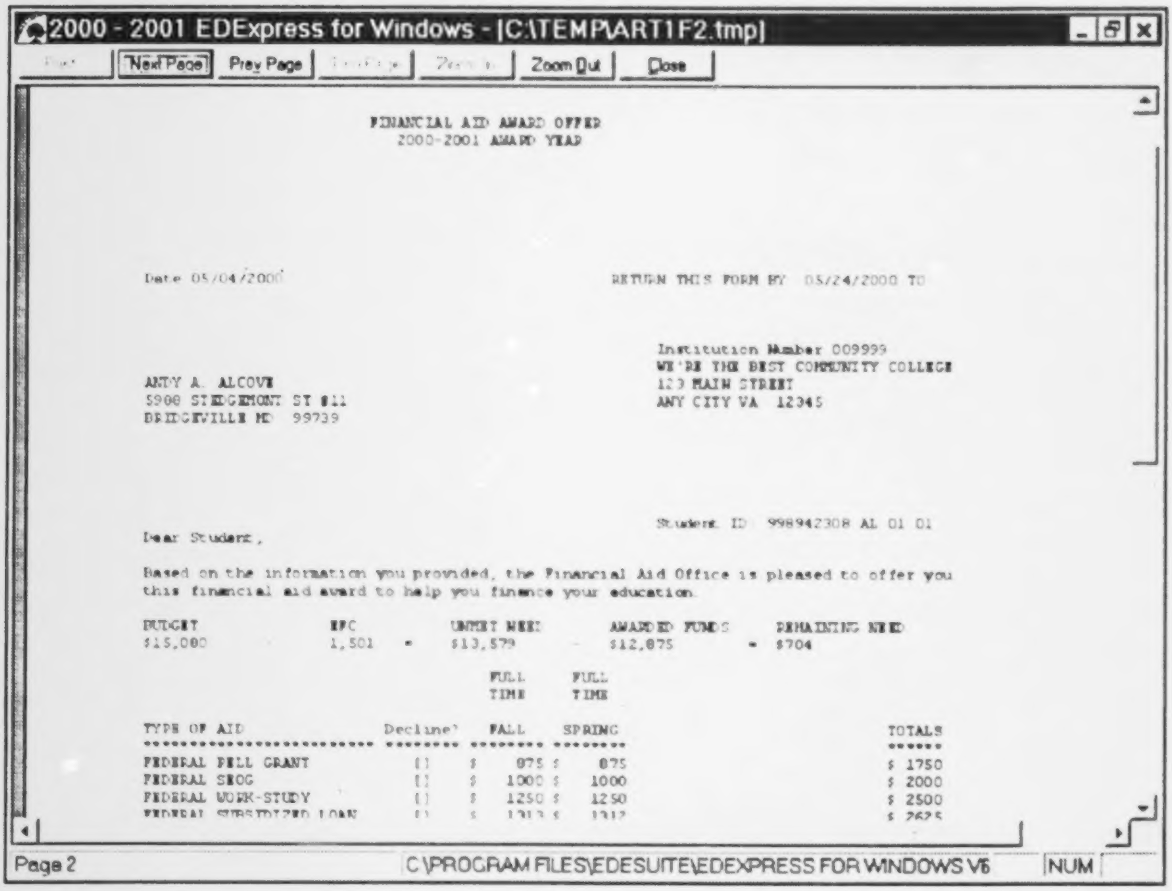
ANDY A. ALCOVE
5988 STEDGEMONT ST #11
BRIDGEVILLE MD 99739

Student ID: 998942308 AL 01 01

Dear Student,

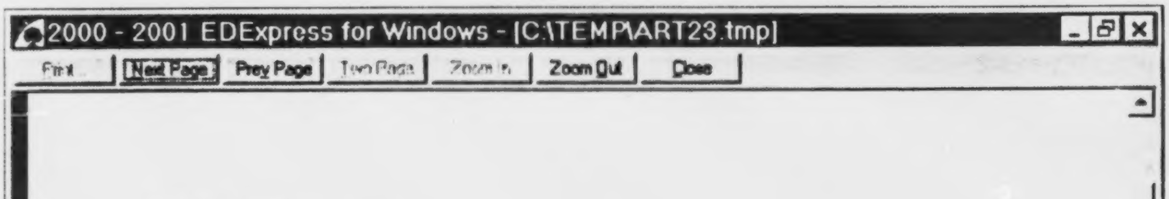
Please carefully review your enclosed award letter and follow the instructions. Note that this award package is based on your full-time enrollment for both the fall and spring semesters of the 2000-2001 academic year. If you will be attending less than full-time, please indicate your enrollment plans.

The award letter displays as the second page


2000 - 2001 EDExpress for Windows - [C:\TEMP\ART1F2.tmp]
Next Page
Prev Page
Zoom Out
Close
Page 2
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

```
                    FINANCIAL AID AWARD OFFER
                      2000-2001 AWARD YEAR


Date 05/04/2000                         RETURN THIS FORM BY  05/24/2000 TO


                                           Institution Number 009999
                                           WE'RE THE BEST COMMUNITY COLLEGE
ANDY A. ALCOVE                             123 MAIN STREET
5900 STEDGEMONT ST #11                     ANY CITY VA  12345
BRIDGEVILLE MD  99739


                                           Student ID  998942308 AL 01 01
Dear Student,

Based on the information you provided, the Financial Aid Office is pleased to offer you
this financial aid award to help you finance your education.

BUDGET           EFC         UNMET NEED       AWARDED FUNDS     REMAINING NEED
$15,000     -    1,501   =   $13,579     -    $12,875       =   $704

                                    FULL      FULL
                                    TIME      TIME

TYPE OF AID                 Decline?   FALL      SPRING                        TOTALS
-------------------------  --------  --------  --------                        ------
FEDERAL PELL GRANT             []     $    875 $    875                        $ 1750
FEDERAL SEOG                   []     $   1000 $   1000                        $ 2000
FEDERAL WORK-STUDY             []     $   1250 $   1250                        $ 2500
FEDERAL SUBSIDIZED LOAN        []     $   1313 $   1312                        $ 2625
```

The missing documents page displays as the third page


2000 - 2001 EDExpress for Windows - [C:\TEMP\ART23.tmp]
Print...
Next Page
Prev Page
Two Page
Zoom In
Zoom Out
Close
Page 3
C:\PROGRAM FILES\EDESUITE\expres01.mdb
NUM

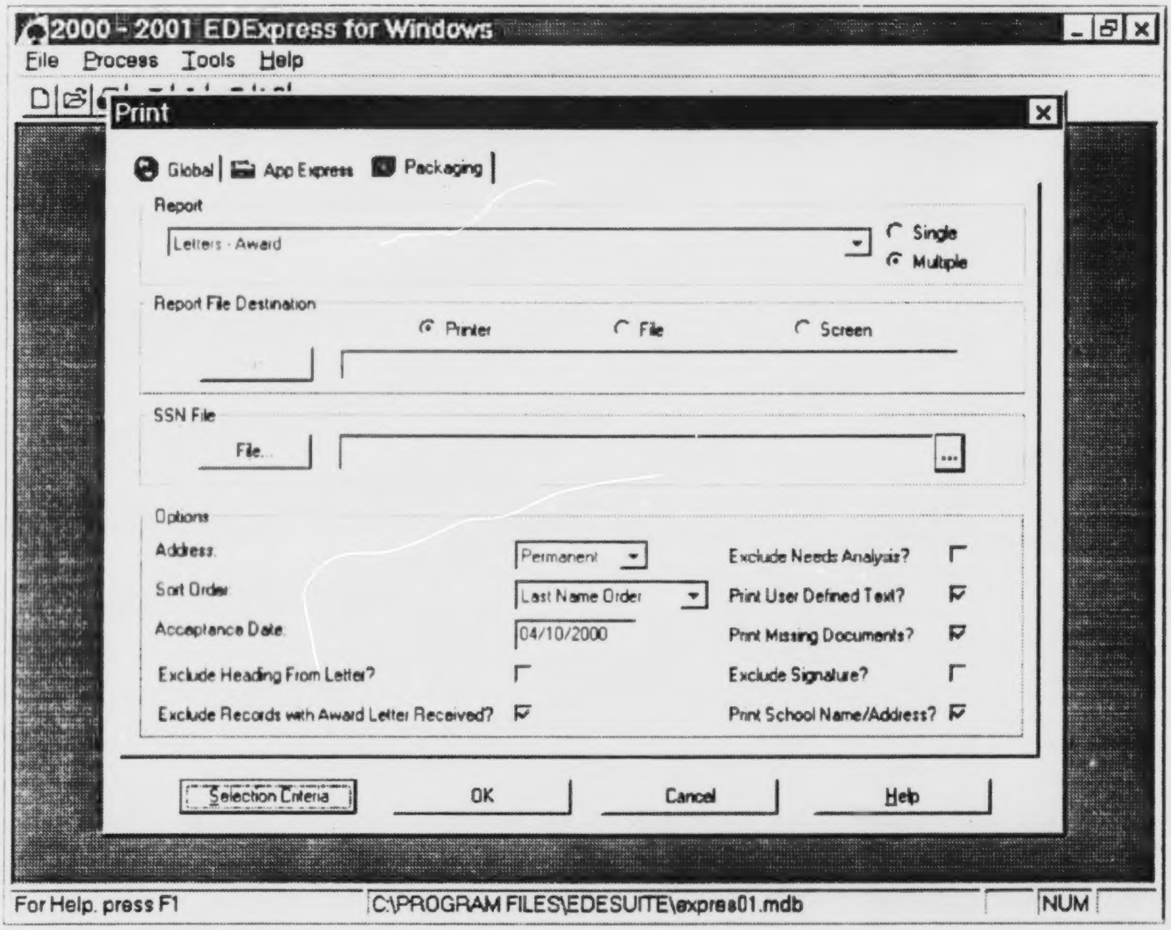
```
ANDY A. ALCOVE
Student ID: 998942308 AL 011




Please note, this offer is an estimate until we have received the following document(s)
from you to complete your financial aid file.  The following documents are missing
and/or incomplete.

Missing      2000-2001 Instiutional Application
```

*Click **Close** when you finish viewing the letter*

Assuming you get the population you want, repeat the process

*This time select **Printer** or **File** as the Report Type Destination*

Tip: To be able to generate and print award letters for students you hand package, you must update the Packaging Status in each record to H (Hand Packaged)


2000 - 2001 EDExpress for Windows
File Process Tools Help
Print
Global
App Express
Packaging
File...
Selection Criteria
OK
Cancel
Help

Report: Letters - Award
○ Single
● Multiple

Report File Destination
● Printer ○ File ○ Screen

SSN File

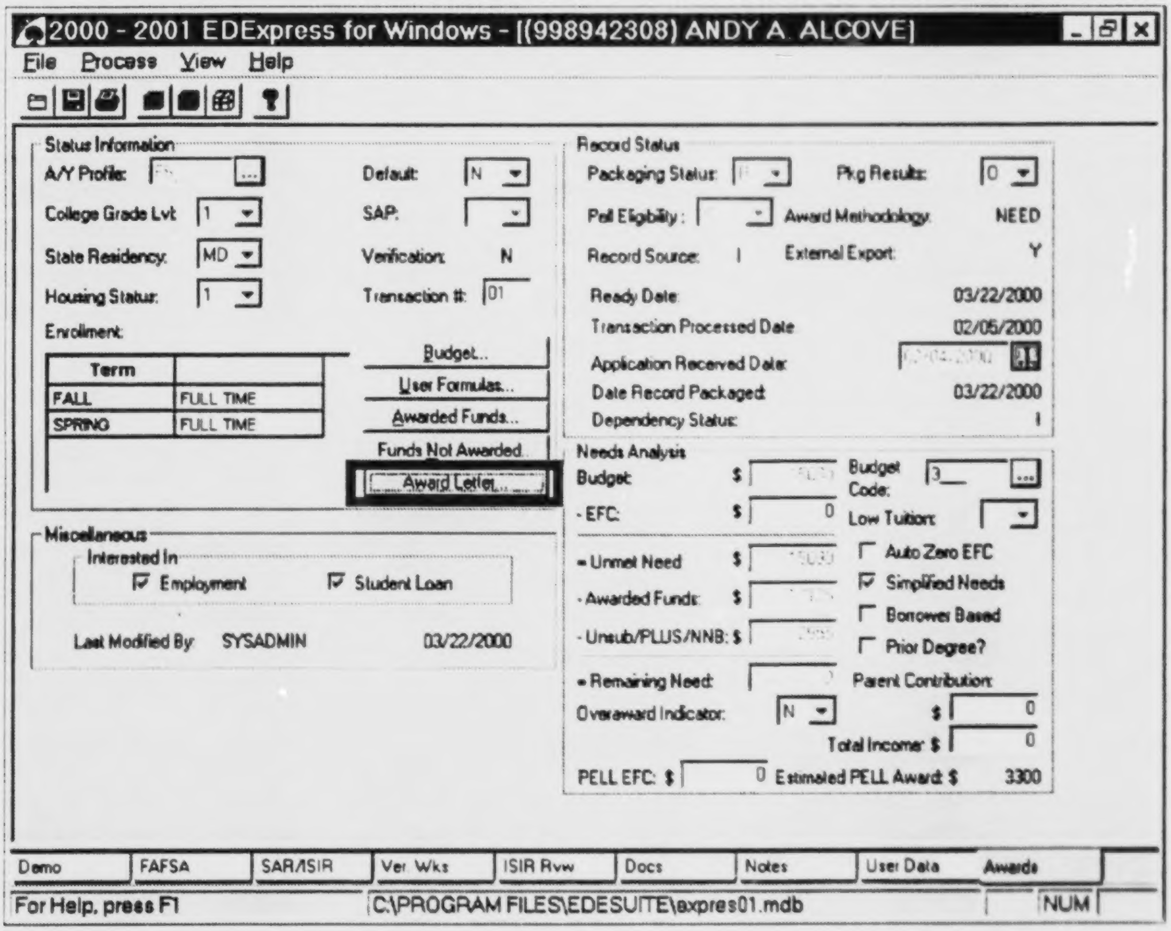
Options
Address: Permanent
Sort Order: Last Name Order
Acceptance Date: 04/10/2000
Exclude Heading From Letter? ☐
Exclude Records with Award Letter Received? ☑
Exclude Needs Analysis? ☐
Print User Defined Text? ☑
Print Missing Documents? ☑
Exclude Signature? ☐
Print School Name/Address? ☑

For Help, press F1 | C:\PROGRAM FILES\EDESUITE\expres01.mdb | NUM

Open the student's record to see how generating and printing the award letter updates the packaging record

*Click the **Award** tab*

*Then, click the **Award Letter** button*


2000 - 2001 EDExpress for Windows - [(998942308) ANDY A. ALCOVE]

File
Process
View
Help

Status Information
A/Y Profile:
Default: N
College Grade Lvl: 1
SAP:
State Residency: MD
Verification: N
Housing Status: 1
Transaction #: 01
Enrollment:

Term	
FALL	FULL TIME
SPRING	FULL TIME

Budget...
User Formulas...
Awarded Funds...
Funds Not Awarded
Award Letter...

Miscellaneous
Interested In
☑ Employment ☑ Student Loan
Last Modified By: SYSADMIN 03/22/2000

Record Status
Packaging Status:
Pkg Results: 0
Pell Eligibility:
Award Methodology: NEED
Record Source: I
External Export: Y
Ready Date: 03/22/2000
Transaction Processed Date: 02/05/2000
Application Received Date:
Date Record Packaged: 03/22/2000
Dependency Status: I

Needs Analysis
Budget: $
Budget Code: 3
- EFC: $ 0
Low Tuition:
= Unmet Need $
☐ Auto Zero EFC
- Awarded Funds: $
☑ Simplified Needs
- Unsub/PLUS/NNB: $
☐ Borrower Based
☐ Prior Degree?
= Remaining Need:
Parent Contribution: $ 0
Overaward Indicator: N
Total Income: $ 0
PELL EFC: $ 0
Estimated PELL Award: $ 3300

Demo
FAFSA
SAR/ISIR
Ver. Wks
ISIR Rvw
Docs
Notes
User Data
Awards

For Help, press F1
C:\PROGRAM FILES\EDESUITE\expres01.mdb
NUM

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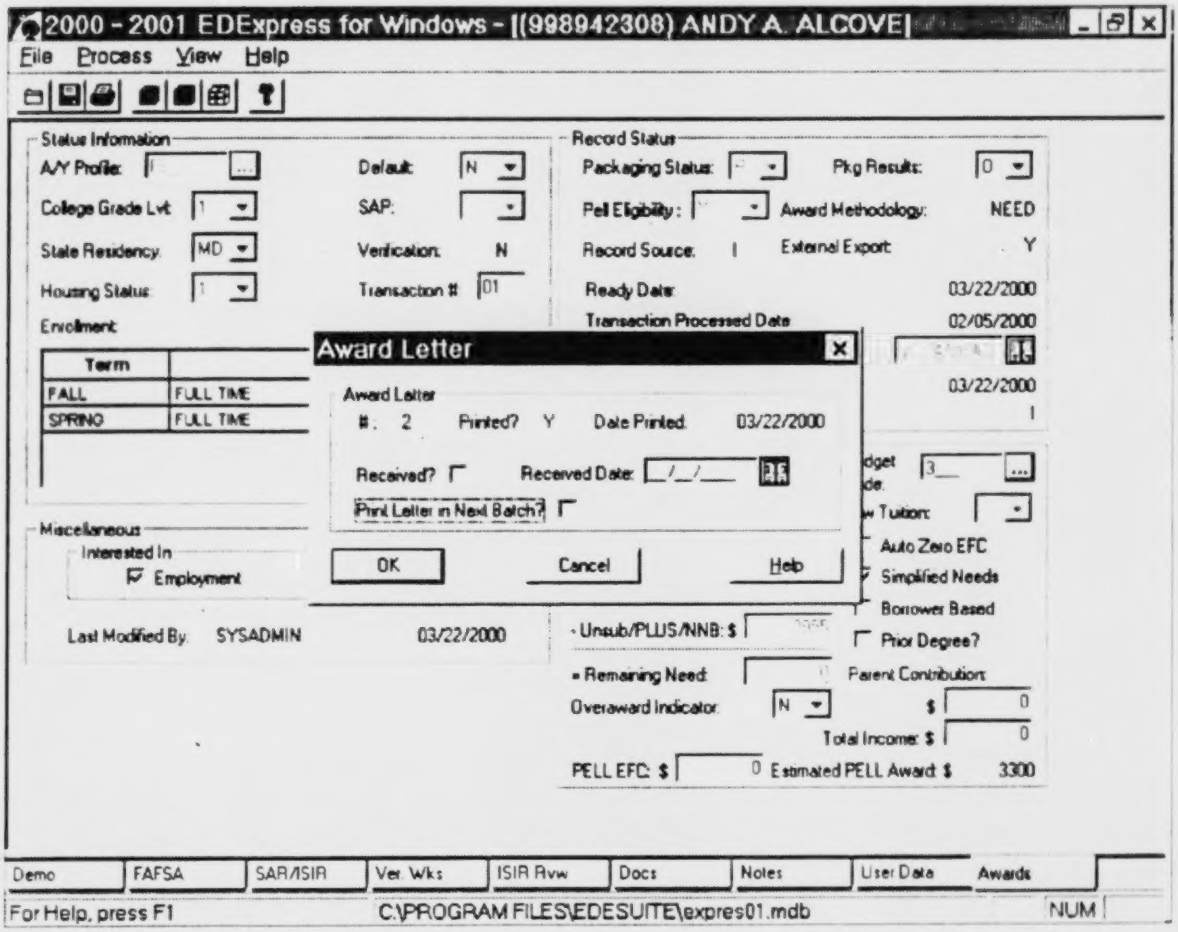
The Award Letter dialog box displays

The Award Letter dialog box displays options available to help you track the status of the award letter

- **Award Letter #**—Number of award letters that have been generated
- **Printed?**—Default N updates to Y once award letter prints
- **Date Printed**—Date award letter last printed
- **Received?**—A check in this box indicates you received a response to the award letter offer
- **Date Received**—Date you received the response
- **Print Letter in Next Batch?**—A check in this box allows you to include the record in the next batch of award letters you generate (if the student record meets the selection criteria)



2000 - 2001 EDExpress for Windows - [(998942308) ANDY A. ALCOVE]

Status Information
A/Y Profile: I
Default: N
College Grade Lvl: 1
SAP:
State Residency: MD
Verification: N
Housing Status: 1
Transaction #: 01

Enrollment

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous
Interested In
☑ Employment

Last Modified By: SYSADMIN 03/22/2000

Record Status
Packaging Status:
Pkg Results: 0
Pell Eligibility:
Award Methodology: NEED
Record Source: I
External Export: Y
Ready Date: 03/22/2000
Transaction Processed Date: 02/05/2000
03/22/2000
I

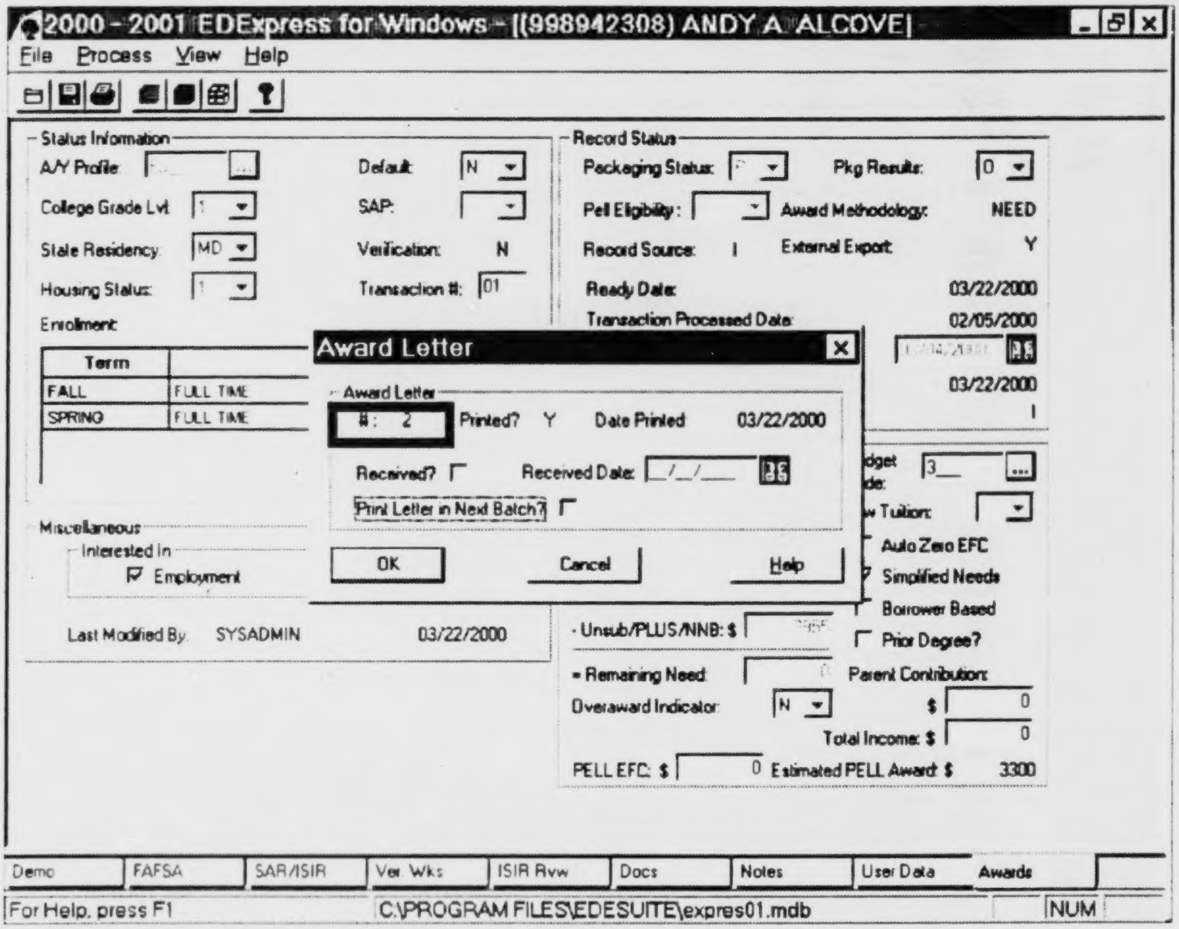
Budget Code: 3
Tuition:
Auto Zero EFC
☑ Simplified Needs
Borrower Based
☐ Prior Degree?
- Unsub/PLUS/NNB: $
= Remaining Need:
Overaward Indicator: N
Parent Contribution: $ 0
Total Income: $ 0
PELL EFC: $ 0
Estimated PELL Award: $ 3300

Award Letter
Award Letter
#: 2 Printed? Y Date Printed: 03/22/2000
Received? ☐ Received Date: __/__/____
Print Letter in Next Batch? ☐

For Help, press F1
C:\PROGRAM FILES\EDESUITE\expres01.mdb

Remember: *Even if you cancel a print job after you generate the letters, the student's record still updates to indicate that a letter was generated.*

Tip: *Once the maximum number of award letters (set in Packaging System Setup) has generated for a student record, you won't be able to include this record in a batch print. However, you can override the default by printing a single award letter from the open student record.*



2000 - 2001 EDExpress for Windows - [(998942308) ANDY A ALCOVE]

Status Information
A/Y Profile:
College Grade Lvl: 1
State Residency: MD
Housing Status: 1
Default: N
SAP:
Verification: N
Transaction #: 01

Enrollment

Term	
FALL	FULL TIME
SPRING	FULL TIME

Miscellaneous
Interested In
☑ Employment
Last Modified By: SYSADMIN 03/22/2000

Record Status
Packaging Status:
Pkg Results: 0
Pell Eligibility:
Award Methodology: NEED
Record Source: I
External Export: Y
Ready Date: 03/22/2000
Transaction Processed Date: 02/05/2000
03/22/2000
I

Budget Code: 3
Tuition:
Auto Zero EFC
Simplified Needs
Borrower Based
☐ Prior Degree?
- Unsub/PLUS/NNB: $
= Remaining Need:
Overaward Indicator: N
Parent Contribution: $ 0
Total Income: $ 0
PELL EFC: $ 0
Estimated PELL Award: $ 3300

Award Letter
Award Letter
#: 2 Printed? Y Date Printed 03/22/2000
Received? ☐ Received Date: __/__/____
Print Letter in Next Batch? ☐

For Help, press F1
C:\PROGRAM FILES\EDESUITE\expres01.mdb
NUM

Generating a Single Award Letter

To generate and print an award letter from an open student record

Click the ***Awards*** *tab*

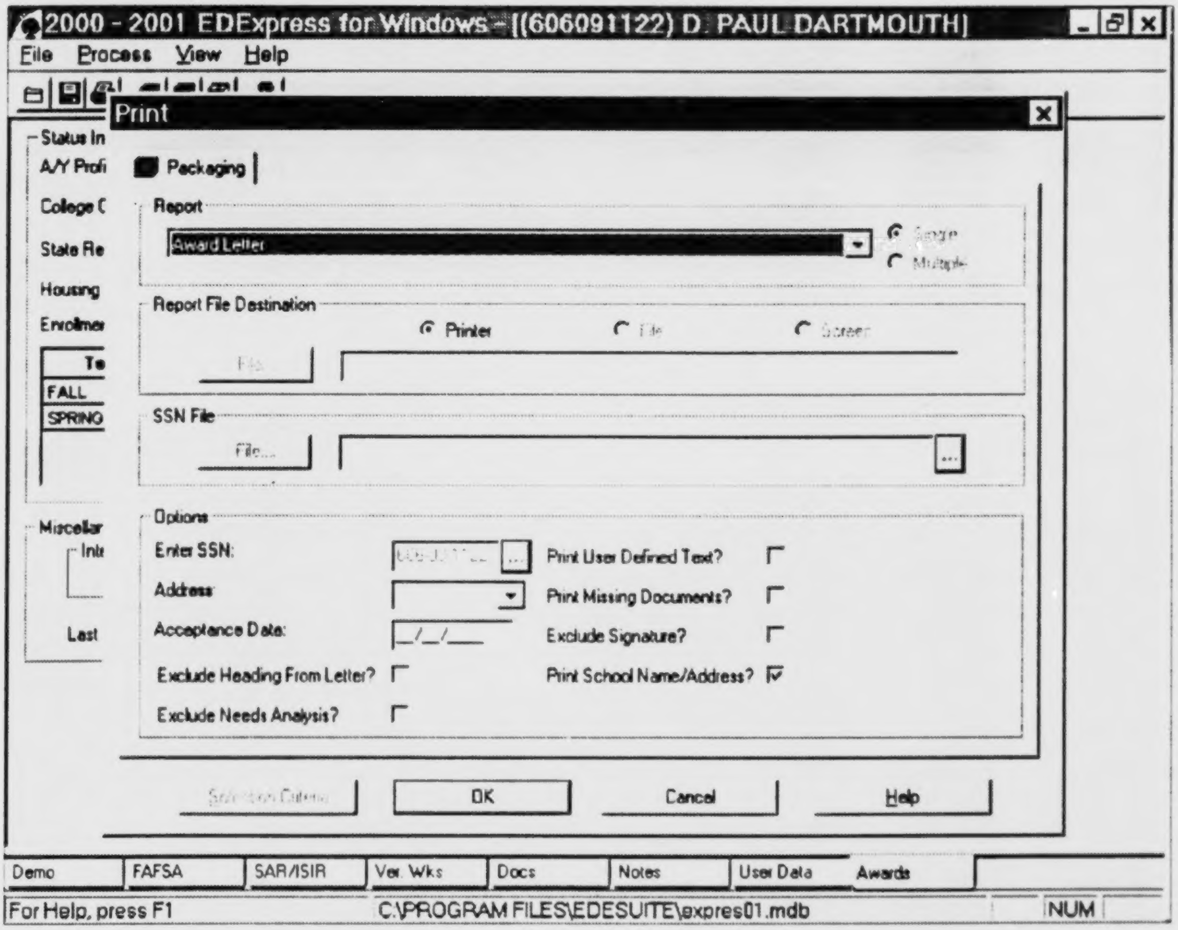
Select ***File/Print*** *on the main menu bar*

The Print dialog box displays

Under Report, select ***Award Letter***

In addition to generating and printing batches of award letters, EDExpress also allows you to print a single letter from an open student record.

The Print dialog box that displays is very similar to the one that displays when you generate and print multiple award letters. The only differences are that EDExpress defaults to print a single letter, the sort order option is excluded, and your only print option is printing the award letter directly to the printer.


2000 - 2001 EDExpress for Windows - [(606091122) D. PAUL DARTMOUTH]
File
Process
View
Help
Print
Packaging
Status In
A/Y Profi
College C
State Re
Housing
Enrollmer
Te
FALL
SPRING
Miscellar
Int
Last
Selection Criteria
OK
Cancel
Help
Demo
FAFSA
SAR/ISIR
Ver. Wks
Docs
Notes
User Data
Awards
For Help, press F1
C:\PROGRAM FILES\EDESUITE\expres01.mdb
NUM

Report: Award Letter ● Single ○ Multiple

Report File Destination: ● Printer ○ File ○ Screen

SSN File: File...

Options

Enter SSN:

Address:

Acceptance Date: _/_/___

Exclude Heading From Letter? ☐

Exclude Needs Analysis? ☐

Print User Defined Text? ☐

Print Missing Documents? ☐

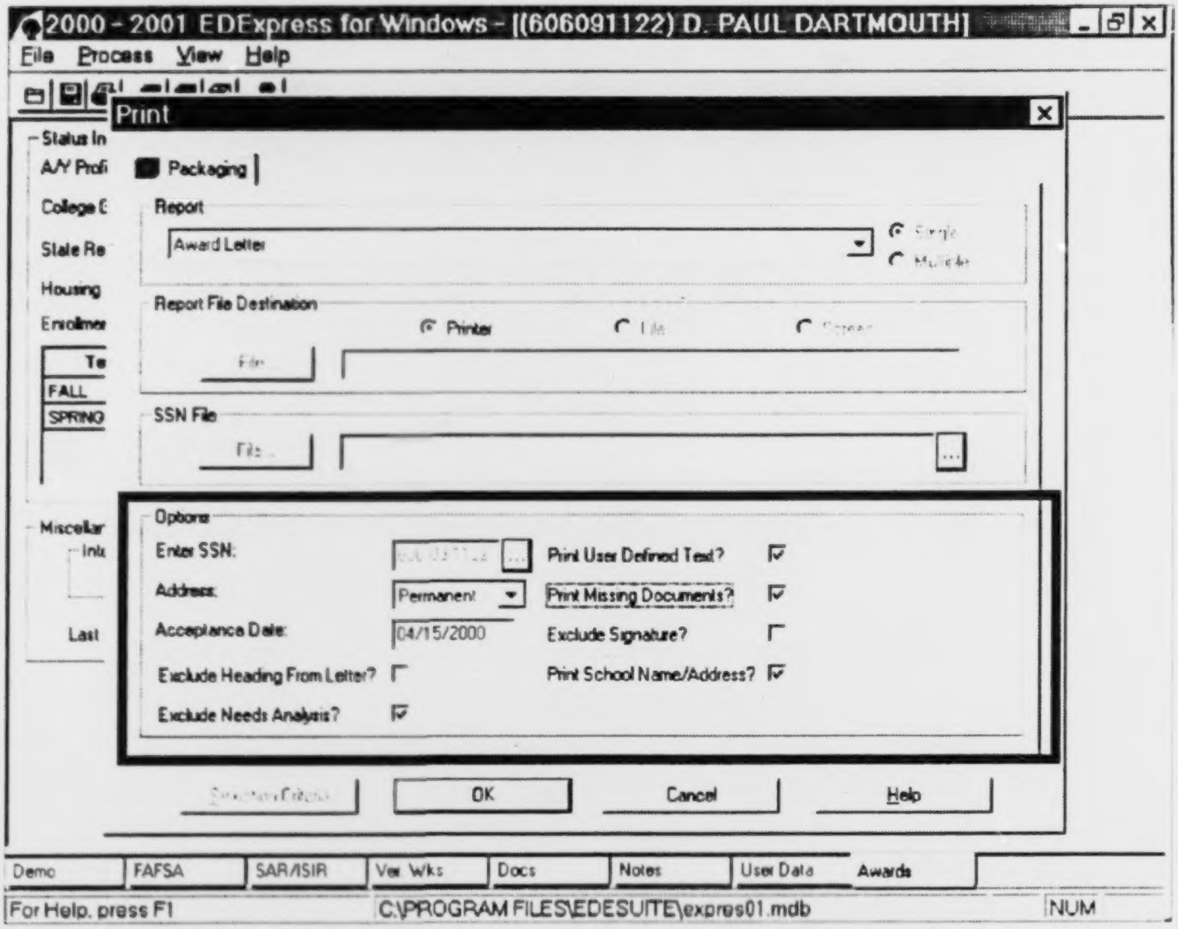
Exclude Signature? ☐

Print School Name/Address? ☑

In this example, the student did not file a FASFA, so the record was created by an external add file. The option to exclude the needs analysis from the award letter is appropriate.

Select the Options you want

Click ***OK***


2000 - 2001 EDExpress for Windows - [(606091122) D. PAUL DARTMOUTH]
File
Process
View
Help
Print
Packaging
Status In
A/Y Profi
College E
State Re
Housing
Enrollmer
Te
FALL
SPRING
Miscellar
Info
Last
File...
File...
Selection Criteria
OK
Cancel
Help
Demo
FAFSA
SAR/ISIR
Ver. Wks
Docs
Notes
User Data
Awards
For Help, press F1
C:\PROGRAM FILES\EDESUITE\expres01.mdb
NUM

Report: Award Letter
● Single ○ Multiple

Report File Destination: ● Printer ○ File ○ Screen

SSN File

Options
Enter SSN:
Address: Permanent
Acceptance Date: 04/15/2000
Exclude Heading From Letter? ☐
Exclude Needs Analysis? ☑
Print User Defined Text? ☑
Print Missing Documents? ☑
Exclude Signature? ☐
Print School Name/Address? ☑

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Creating Export Packaging Files

In addition to being able to bring external data into the EDExpress Packaging and User-defined databases, you also can send out or export data via a file export. Taking advantage of this function can cut down on the amount of time spent on data entry—not only by your office but also by other offices across your campus. Examples of how you might use the EDExpress file export include:

- Send updated address/telephone information you receive via updated ISIR records to the Registrar's Office
- Send names and addresses of new financial aid applicants who haven't applied for admission to the Admission's Office
- Send data to the Office of Institutional Research to use in surveys and/or creating reports
- Send award information to the Business Office

To export a file, you first must create a file format that identifies the fields that you want to export. You can create file formats within each EDExpress module. Then, using the file format you create, you export the information to an external file. A file format is like a template that groups and formats the EDExpress student data you specify. Each file format is identified by a unique code that you define.

[Slide 5-17]

Creating A File Format

With this utility, you set up file formats to use when exporting data to external systems. You also identify what fields of data will be exported. Each file format you create contains the following components:

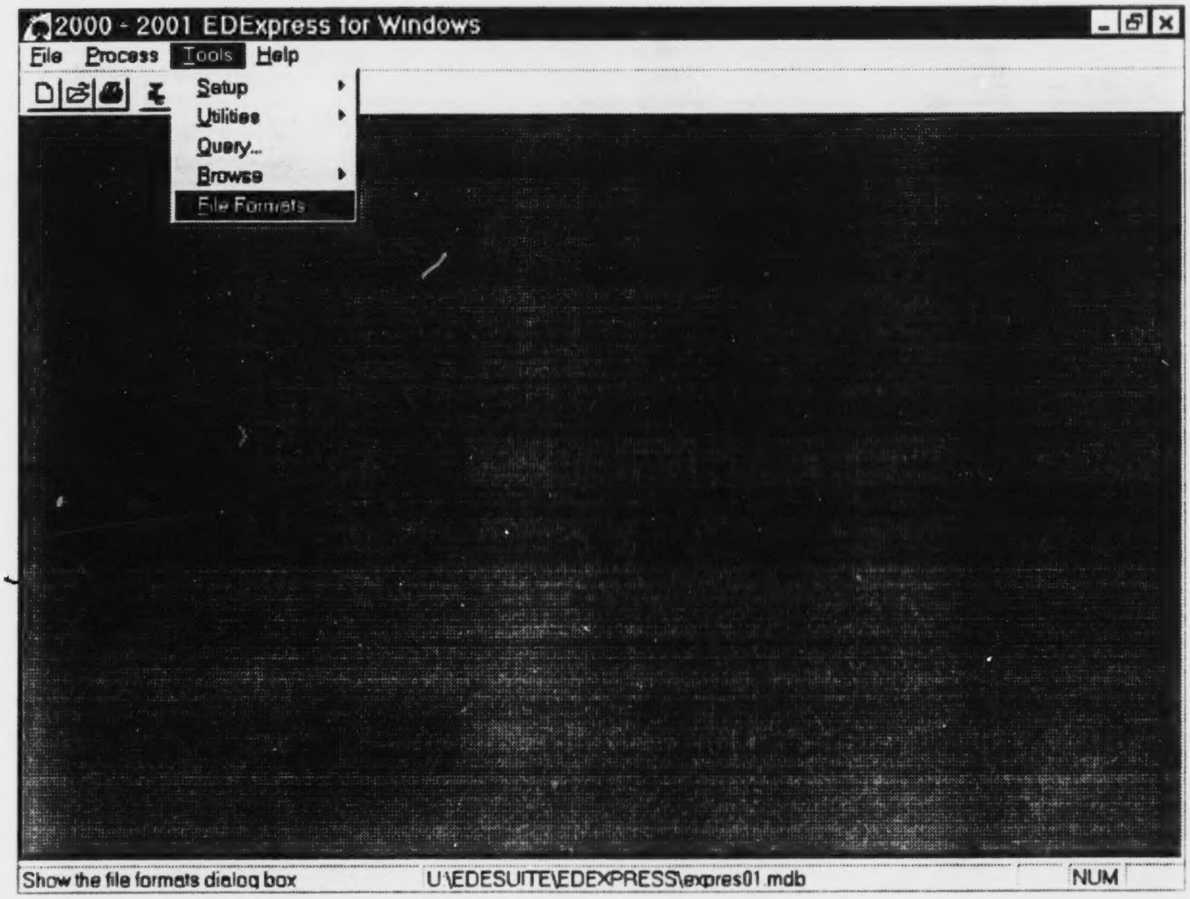
- **Format Code**—Unique code that identifies the specific external file you want to create (up to 2 alphanumeric characters)
- **Format Description**—Title for or description of the format (up to 50 alphanumeric characters)
- **Field Description**—The specific data fields that you want to include in the export file

[Slide 5-18]

The following is an example of an export file that might be used by HR. It includes information on students who have accepted Federal Work-Study awards.

To create a File Format

Select ***Tools/File Format*** *from the menu bar.*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Setup
Utilities
Query...
Browse
File Formats
NUM

Show the file formats dialog box

U:\EDESUITE\EDEXPRESS\expres01.mdb

The File Formats dialog box displays

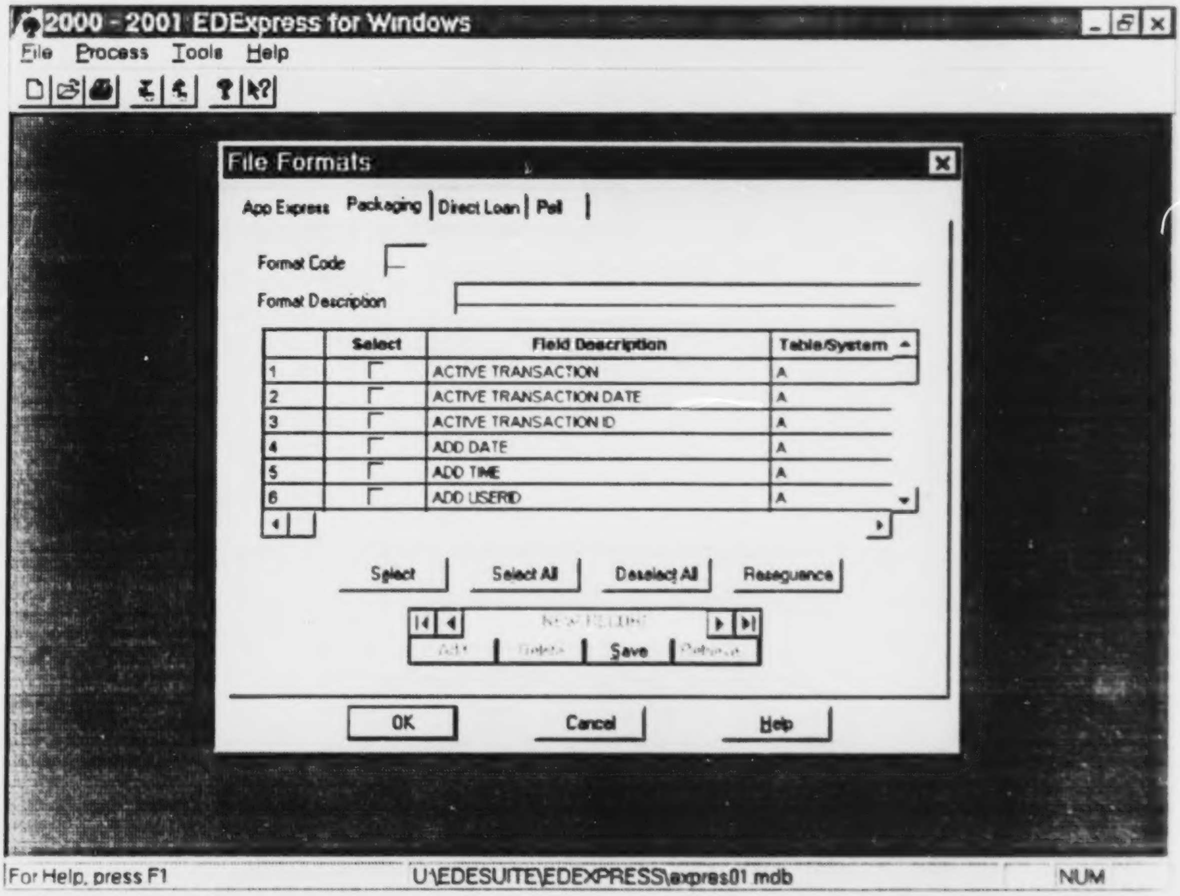
*Click the **Packaging** tab*

*Click **Add** to create a new File Format record*

The File Formats dialog box includes the following columns

- **Select**—Checkboxes that indicate the field(s) you want
- **Field Description**—Description of the available fields
- **Table/System**—Location of the data fields
- **Sequence**—Order that data fields will appear in the export file

Note: Scroll to the right to view the Sequence column



2000 - 2001 EDExpress for Windows

File Formats

Format Code

Format Description

	Select	Field Description	Table/System
1	☐	ACTIVE TRANSACTION	A
2	☐	ACTIVE TRANSACTION DATE	A
3	☐	ACTIVE TRANSACTION ID	A
4	☐	ADD DATE	A
5	☐	ADD TIME	A
6	☐	ADD USERID	A

For Help, press F1

U:\EDESUITE\EDEXPRESS\expres01.mdb

NUM

File
Process
Tools
Help
App Express
Packaging
Direct Loan
Pell
Select
Select All
Deselect All
Resequence
Save
OK
Cancel
Help

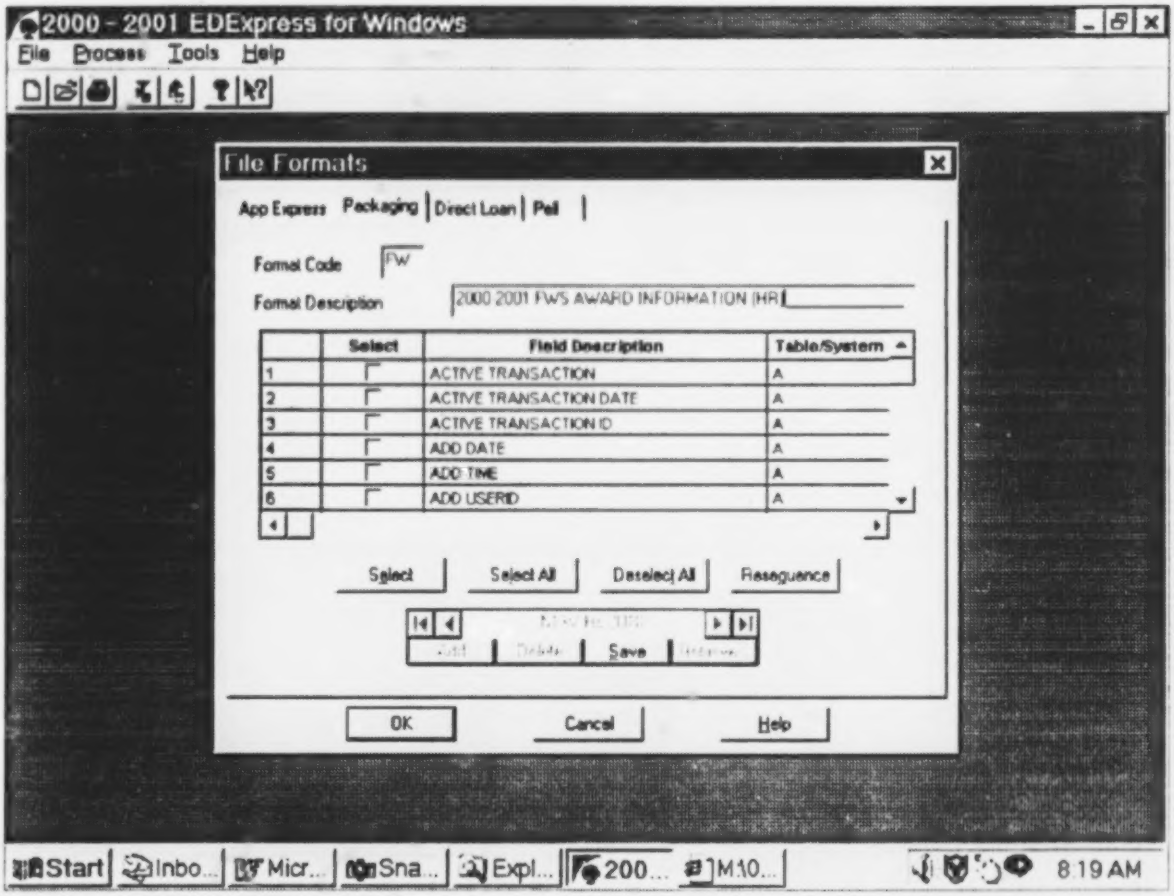
IMPORTANT NOTE!: For the 2000-2001 academic year, EDExpress is unable to export term-specific financial aid award data. Only total academic year award information is available for export. Depending on your needs and your MIS technical expertise and/or support, the following options might be viable workarounds:

- *Export an EDExpress file that that includes the total academic year award information. Convert the file to an Excel spreadsheet and divide the academic year awards into term awards. Then convert Excel file to a format that can be used by the Business Office.*
- *Since all of your EDExpress data is stored in a Microsoft Access database, use Microsoft Access to query the applicable term award table. Then, export the Access query file to a format that can be used by the Business Office.*

Remember, CPS does not support systems other than EDExpress. Before you attempt to use Microsoft Access to query your database, backup your original database as a safeguard in the event your original database is corrupted.

*Enter a unique **Format Code** (up to 2 alphanumeric characters) to identify the file format.*

*Enter a **Description** (up to 50 alphanumeric characters) of the format.*


2000 - 2001 EDExpress for Windows
File Process Tools Help
File Formats
App Express
Packaging
Direct Loan
Pell
Select
Select All
Deselect All
Resequence
Add
Delete
Save
Retrieve
OK
Cancel
Help
Start
Inbo...
Micr...
Sna...
Expl...
200...
M10...
8:19 AM

Format Code: FW

Format Description: 2000 2001 FWS AWARD INFORMATION (HR)

	Select	Field Description	Table/System
1	☐	ACTIVE TRANSACTION	A
2	☐	ACTIVE TRANSACTION DATE	A
3	☐	ACTIVE TRANSACTION ID	A
4	☐	ADD DATE	A
5	☐	ADD TIME	A
6	☐	ADD USERID	A

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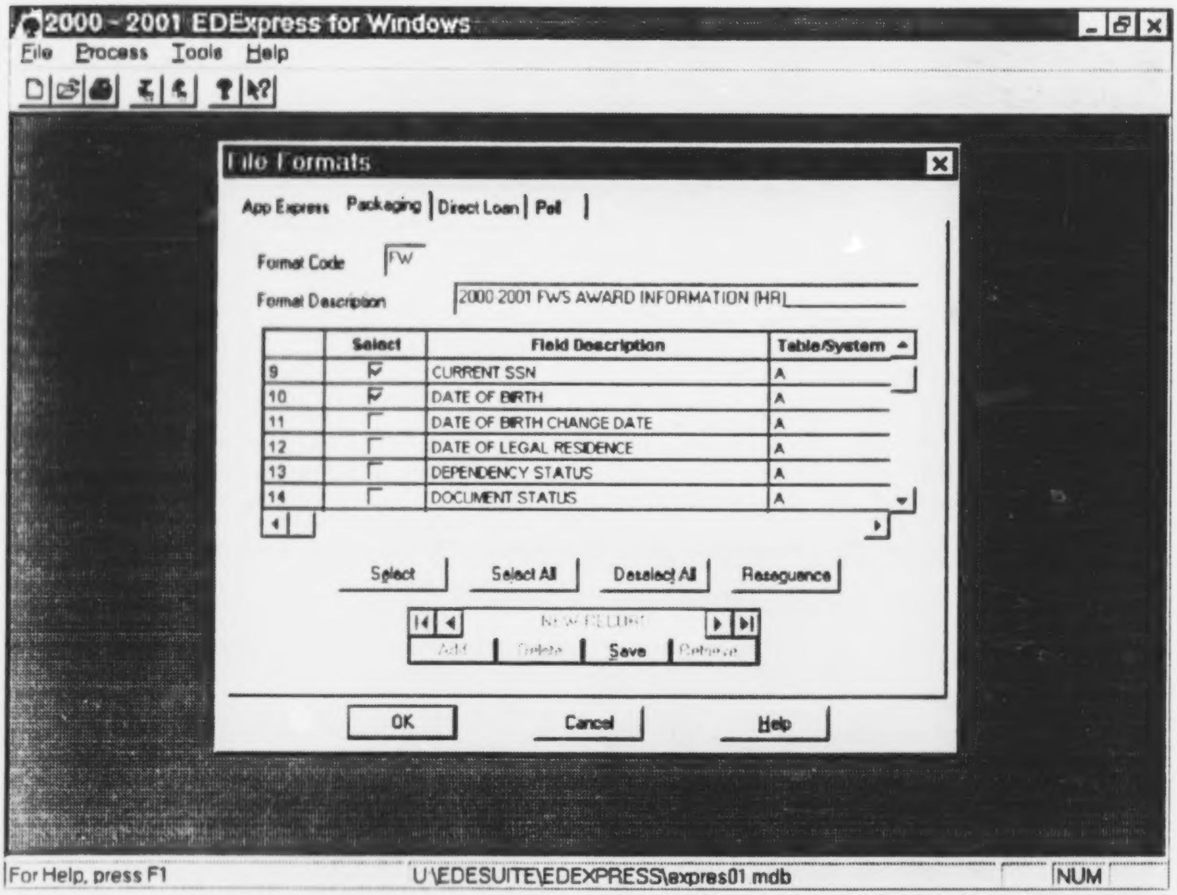
Scroll down to view the listing of available fields.

In the order that you want the fields to appear in the file format, click the ***Select*** *checkbox of each field you want.*

- *Current SSN*
- *First and last name*
- *Date of birth*
- *Permanent address, city, state, zip*
- *Permanent phone*
- *Fund code*
- *Fund current total*

The File Formats dialog box displays all available fields in the Packaging database. When creating a file format, you must determine which fields to include.


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
File Formats
App Express
Packaging
Direct Loan
Pell
Select
Select All
Deselect All
Resequence
NEW RECORD
Add
Delete
Save
Retrieve
OK
Cancel
Help
For Help, press F1
NUM

Format Code: FW

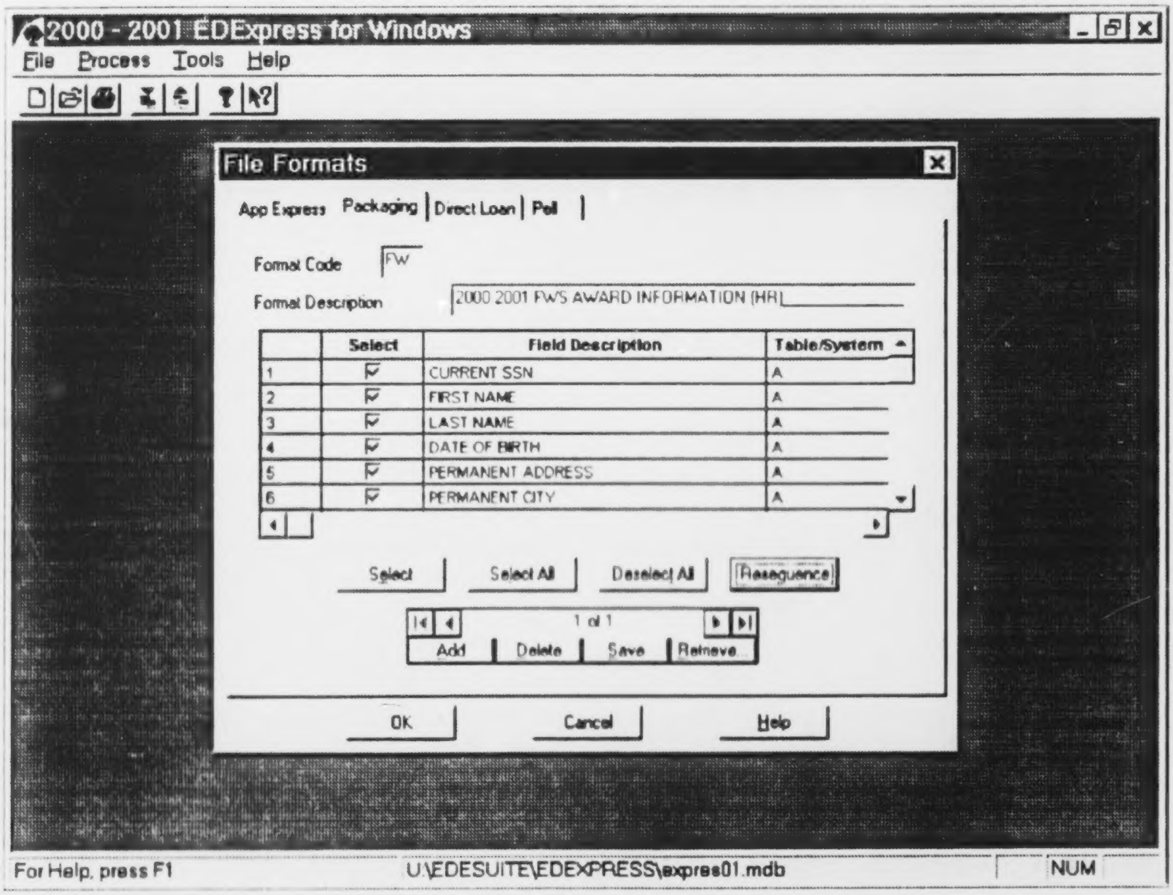
Format Description: 2000 2001 FWS AWARD INFORMATION (HR)

	Select	Field Description	Table/System
9	☑	CURRENT SSN	A
10	☑	DATE OF BIRTH	A
11	☐	DATE OF BIRTH CHANGE DATE	A
12	☐	DATE OF LEGAL RESIDENCE	A
13	☐	DEPENDENCY STATUS	A
14	☐	DOCUMENT STATUS	A

U:\EDESUITE\EDEXPRESS\expres01.mdb

The order you select fields determines the order they appear in the export file. However, you can resequence the fields (according to Table/System type) until they are in the order you want them. Clicking the Resequence button sorts all the fields you selected by Table/System type and shifts them to the top of the list.

Click the ***Resequence*** *button to reorder the fields you selected*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
File Formats
App Express
Packaging
Direct Loan
Pell
Select
Select All
Deselect All
Resequence
1 of 1
Add
Delete
Save
Retrieve...
OK
Cancel
Help
For Help, press F1
NUM

Format Code: FW

Format Description: 2000 2001 FWS AWARD INFORMATION (HR)

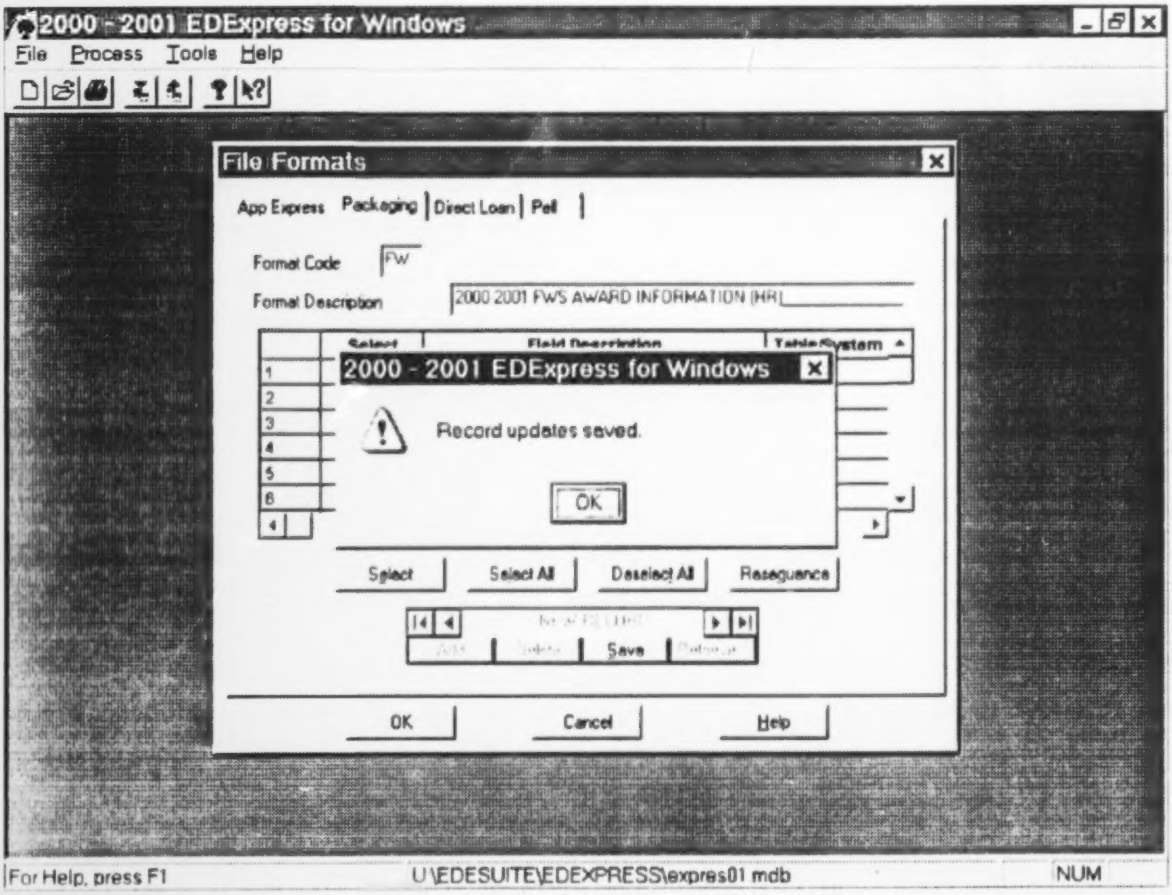
	Select	Field Description	Table/System
1	☑	CURRENT SSN	A
2	☑	FIRST NAME	A
3	☑	LAST NAME	A
4	☑	DATE OF BIRTH	A
5	☑	PERMANENT ADDRESS	A
6	☑	PERMANENT CITY	A

U:\EDESUITE\EDEXPRESS\expres01.mdb

*Click **Save** to save this format.*

The Record Updates Saved dialog box displays.

*Click **OK***


2000 - 2001 EDExpress for Windows
File Process Tools Help
File Formats
App Express Packaging Direct Loan Pell
Select Field Description Table/System
1
2
3
4
5
6
Select Select All Deselect All Resequence
NEW RECORD
Add Delete Save Retrieve
OK Cancel Help
2000 - 2001 EDExpress for Windows
OK
For Help, press F1
NUM

Format Code: FW

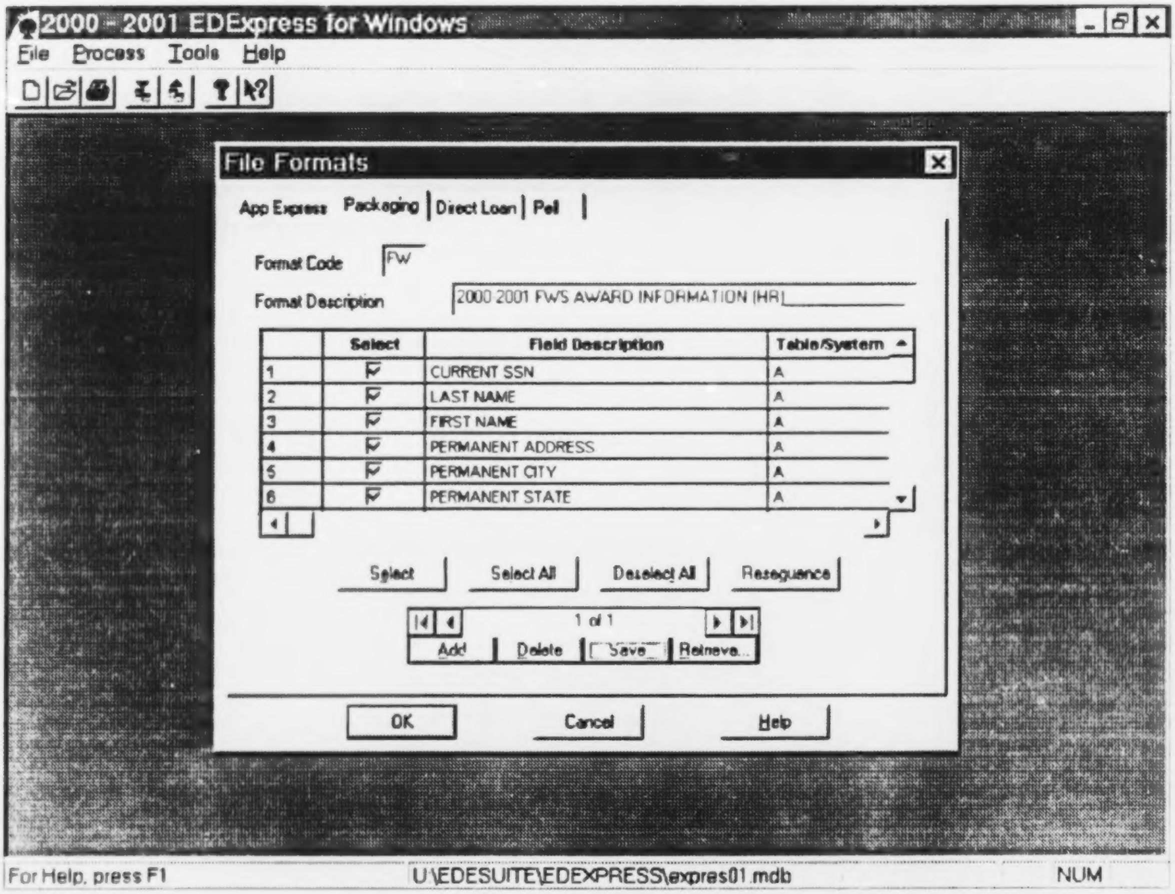
Format Description: 2000-2001 FWS AWARD INFORMATION (HR)

Record updates saved.

U:\EDESUITE\EDEXPRESS\expres01.mdb

The completed file format displays

*Click **OK** to close the File Formats dialog box*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
File Formats
App Express
Packaging
Direct Loan
Pell
Select
Select All
Deselect All
Resequence
1 of 1
Add
Delete
Save
Retrieve...
OK
Cancel
Help
For Help, press F1
NUM

Format Code: FW

Format Description: 2000-2001 FWS AWARD INFORMATION (HR)

	Select	Field Description	Table/System
1	☑	CURRENT SSN	A
2	☑	LAST NAME	A
3	☑	FIRST NAME	A
4	☑	PERMANENT ADDRESS	A
5	☑	PERMANENT CITY	A
6	☑	PERMANENT STATE	A

U:\EDESUITE\EDEXPRESS\expres01.mdb

Printing A File Format

To print a file format

*Select **File/Print** from the main menu*

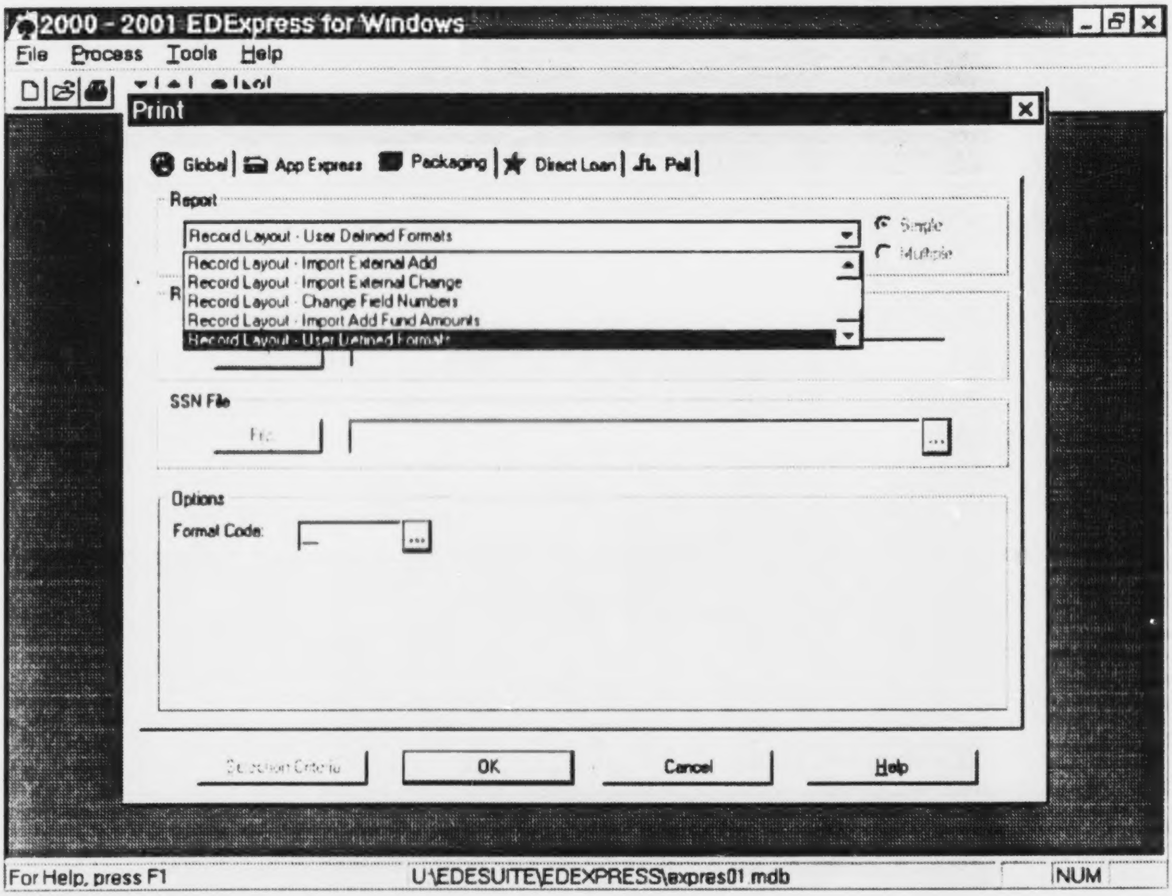
The Print dialog box displays

*Click the **Packaging** tab*

*Select the report **Record Layout-User Defined Formats***

You may need to see exactly what the format layout you created looks like. Using the print function, you can create a report that includes the field lengths, start and end positions, and the total record length.

[Slide 5-19]


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Print
Global
App Express
Packaging
Direct Loan
Pell
Record Layout - Import External Add
Record Layout - Import External Change
Record Layout - Change Field Numbers
Record Layout - Import Add Fund Amounts
Record Layout - User Defined Formats
SSN File
File
Selection Criteria
OK
Cancel
Help
NUM

Report: Record Layout - User Defined Formats

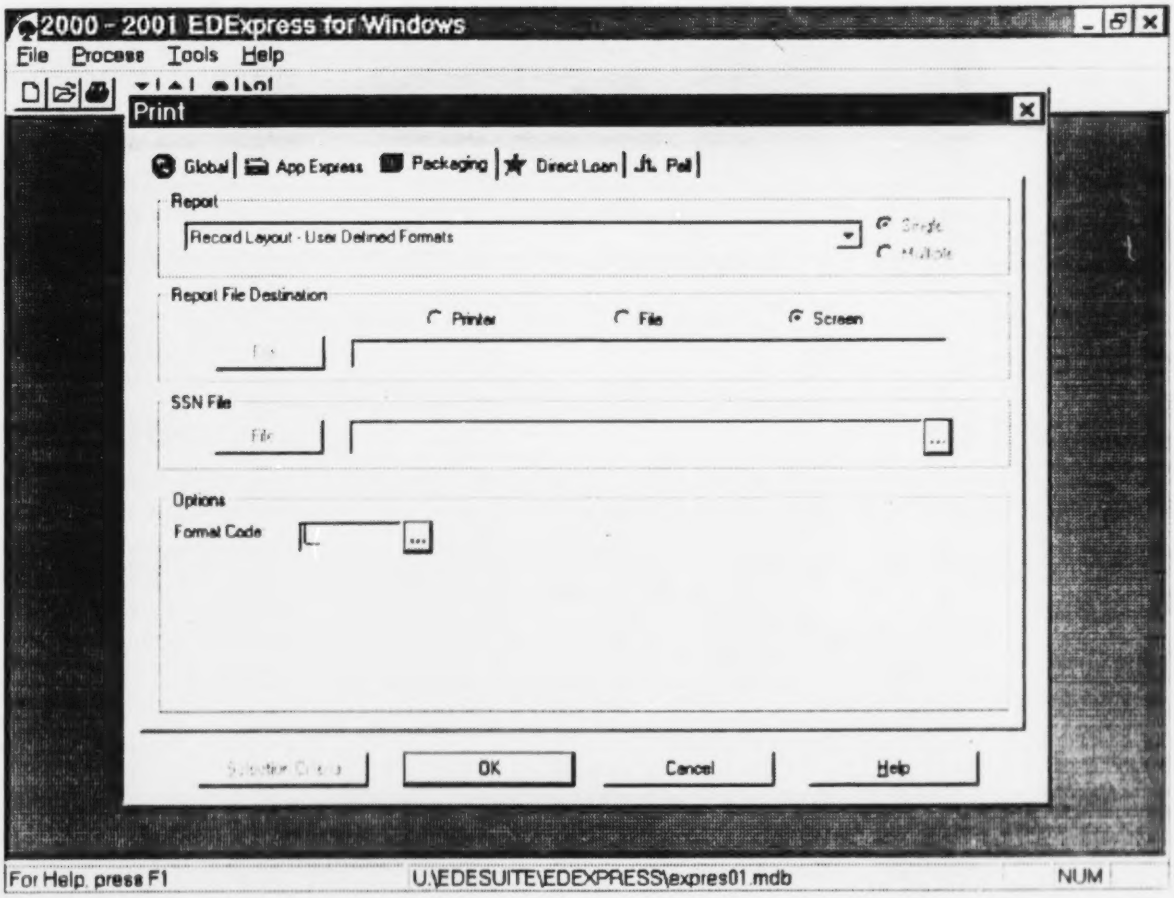
● Single
○ Multiple

Options
Format Code:

For Help, press F1
U:\EDESUITE\EDEXPRESS\expres01.mdb

Click ***Screen*** *to view the output on the screen*

Click the ***Format Code*** *ellipsis button to display your list of format codes*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Print
Global
App Express
Packaging
Direct Loan
Pell
Report
Single
Multiple
Report File Destination
File
SSN File
File
Options
Selection Criteria
OK
Cancel
Help
For Help, press F1
NUM

Report: Record Layout - User Defined Formats

○ Printer ○ File ● Screen

Format Code: ...

U:\EDESUITE\EDEXPRESS\expres01.mdb

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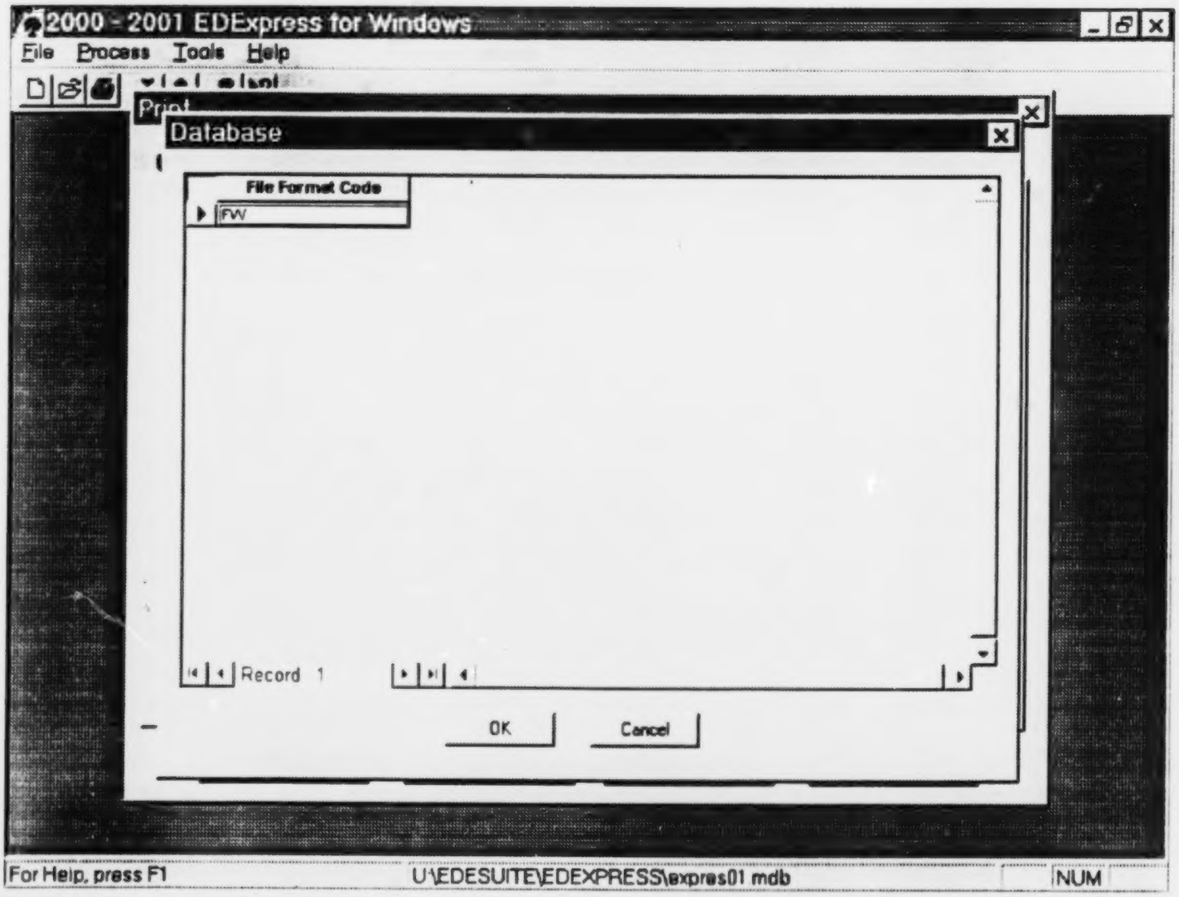
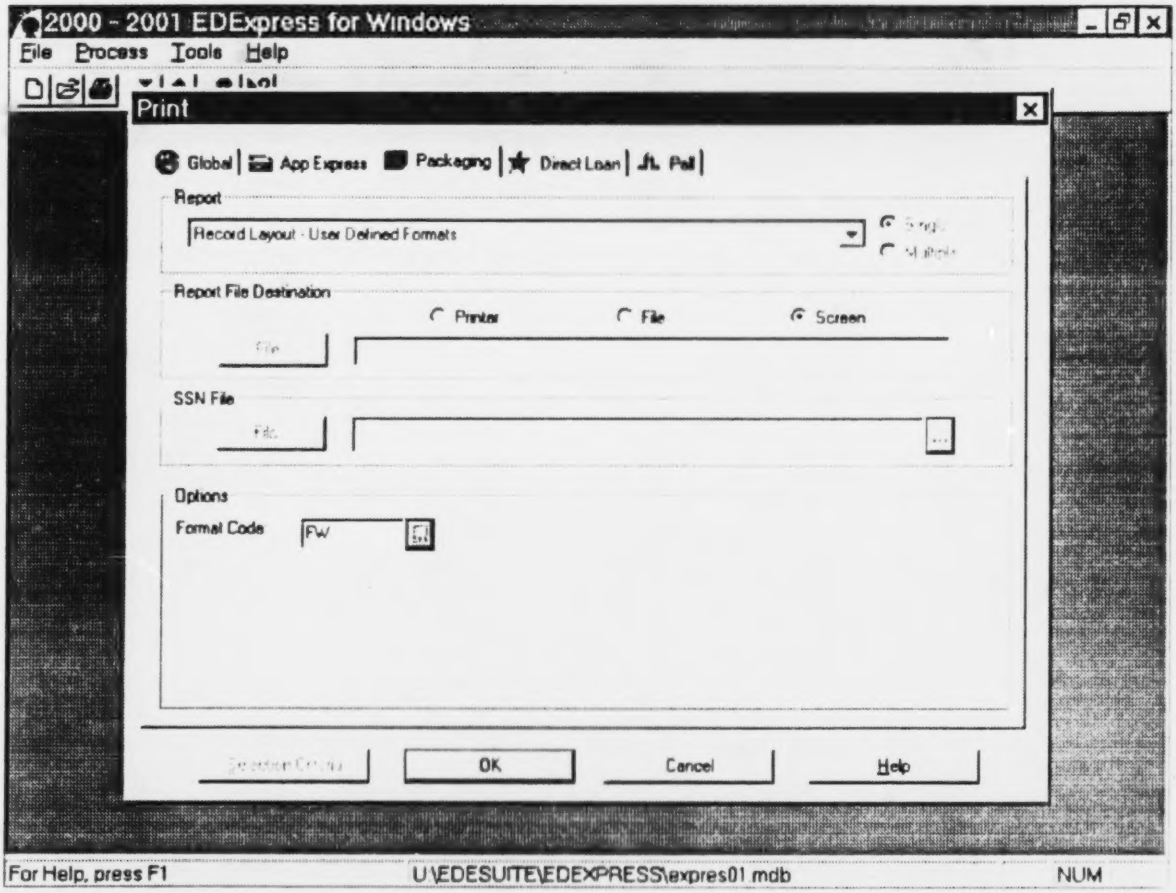
The Database dialog box listing format codes displays

Select the ***File Format Code*** *you want*

Click ***OK*** *to close and return to the Print dialog box*


2000 - 2001 EDExpress for Windows
File Process Tools Help
Print
Database
File Format Code
FW
Record 1
OK
Cancel
For Help, press F1
U:\EDESUITE\EDEXPRESS\expres01 mdb
NUM

*Click **OK** to print the report on screen*


2000 - 2001 EDExpress for Windows
File Process Tools Help
Print
Global
App Express
Packaging
Direct Loan
Pell
File...
File...
Selection Criteria
OK
Cancel
Help

Report: Record Layout - User Defined Formats

● Single
○ Multiple

Report File Destination: ○ Printer ○ File ● Screen

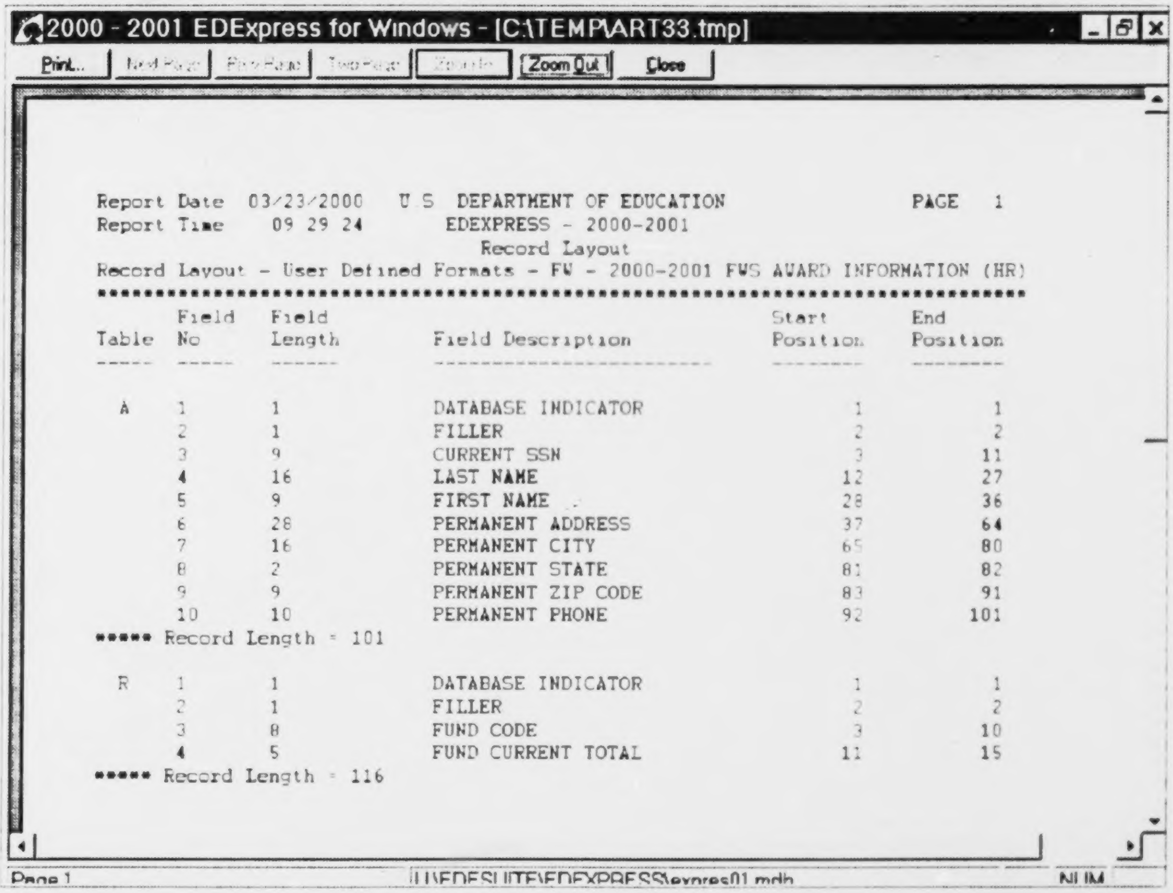
SSN File

Options

Format Code: FW

For Help, press F1 U:\EDESUITE\EDEXPRESS\expres01.mdb NUM

The Record Layout Report provides the layout for the format you created The record length displays at the bottom of the report


2000 - 2001 EDExpress for Windows - [C:\TEMP\ART33.tmp]
Print...
Next Page
Prev Page
Two Page
Zoom In
Zoom Out
Close
Page 1
U:\EDESUITE\EDEXPRESS\expres01.mdb
NUM

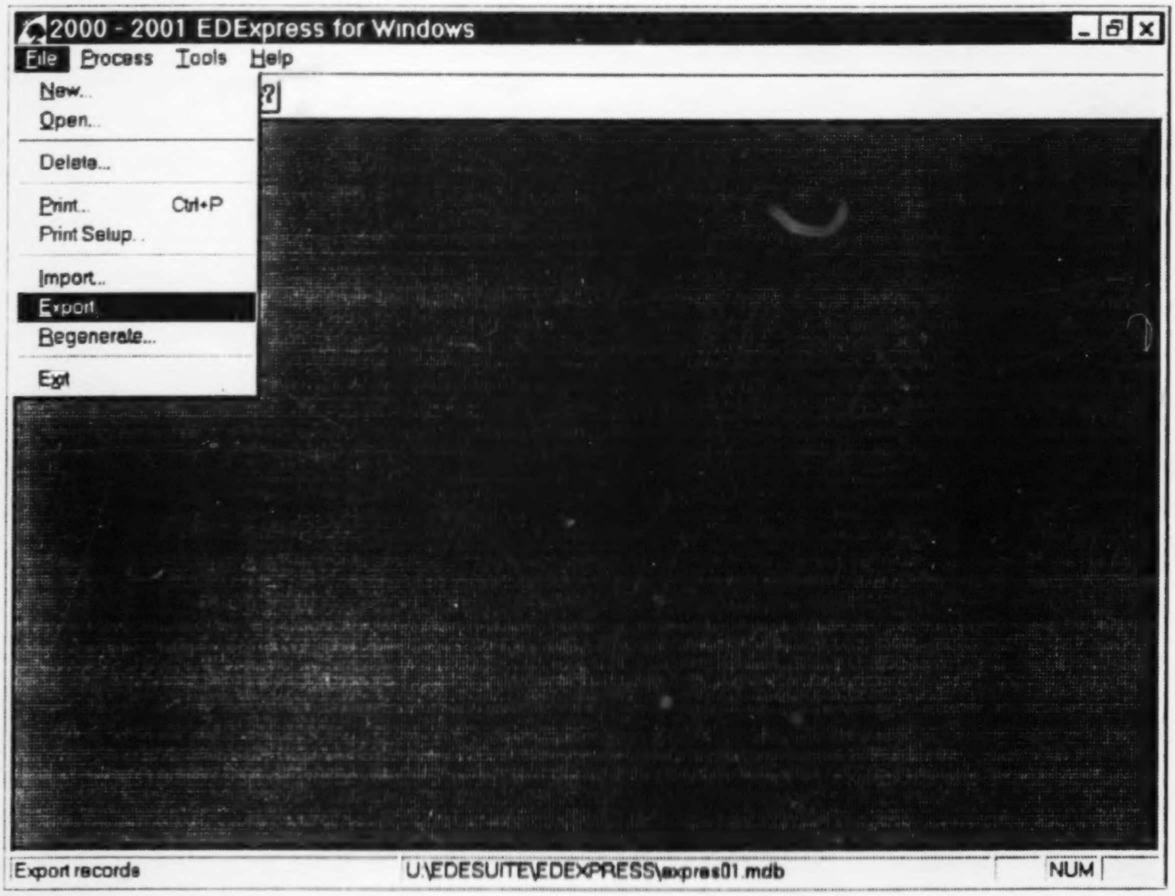
```
Report Date  03/23/2000   U S  DEPARTMENT OF EDUCATION               PAGE   1
Report Time    09 29 24        EDEXPRESS - 2000-2001
                                    Record Layout
Record Layout - User Defined Formats - FW - 2000-2001 FWS AWARD INFORMATION (HR)
********************************************************************************
      Field   Field                                      Start        End
Table  No     Length        Field Description            Position     Position
-----  -----  ------        ------------------------     --------     --------

  A    1      1             DATABASE INDICATOR                  1            1
       2      1             FILLER                              2            2
       3      9             CURRENT SSN                         3           11
       4      16            LAST NAME                          12           27
       5      9             FIRST NAME                         28           36
       6      28            PERMANENT ADDRESS                  37           64
       7      16            PERMANENT CITY                     65           80
       8      2             PERMANENT STATE                    81           82
       9      9             PERMANENT ZIP CODE                 83           91
       10     10            PERMANENT PHONE                    92          101
***** Record Length = 101

  R    1      1             DATABASE INDICATOR                  1            1
       2      1             FILLER                              2            2
       3      8             FUND CODE                           3           10
       4      5             FUND CURRENT TOTAL                 11           15
***** Record Length = 116
```

Exporting Packaging Data

After creating the file format, you can create an export file However, you first may need to create a query to select the student records you want to export The following example uses a parameter query created in the Packaging database to select student records, based on fund code, to include in the export file

To create an export file

*Select **File/Export** from the menu bar*

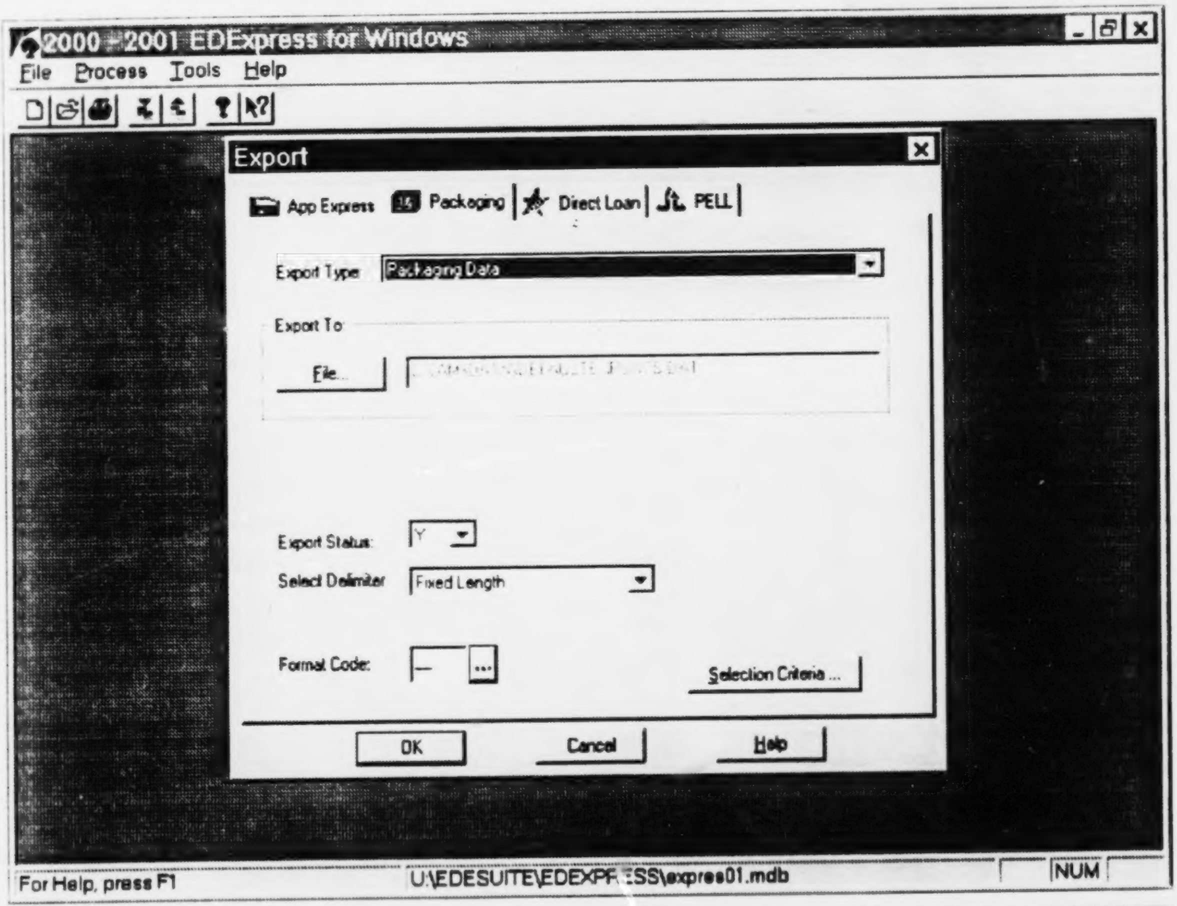

2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
New...
Open...
Delete...
Print... Ctrl+P
Print Setup...
Import...
Export
Regenerate...
Exit
Export records
U:\EDESUITE\EDEXPRESS\expres01.mdb
NUM

The Export dialog box displays

Click the ***Packaging*** *tab*

Click the ***Export Type*** *down arrow and select Packaging Data*

Click the ***Export to: File*** *button*



2000 - 2001 EDExpress for Windows
File Process Tools Help
Export
App Express
Packaging
Direct Loan
PELL
File...
Selection Criteria ...
OK
Cancel
Help
For Help, press F1
NUM

Export Type: Packaging Data

Export Status: Y

Select Delimiter: Fixed Length

Format Code:

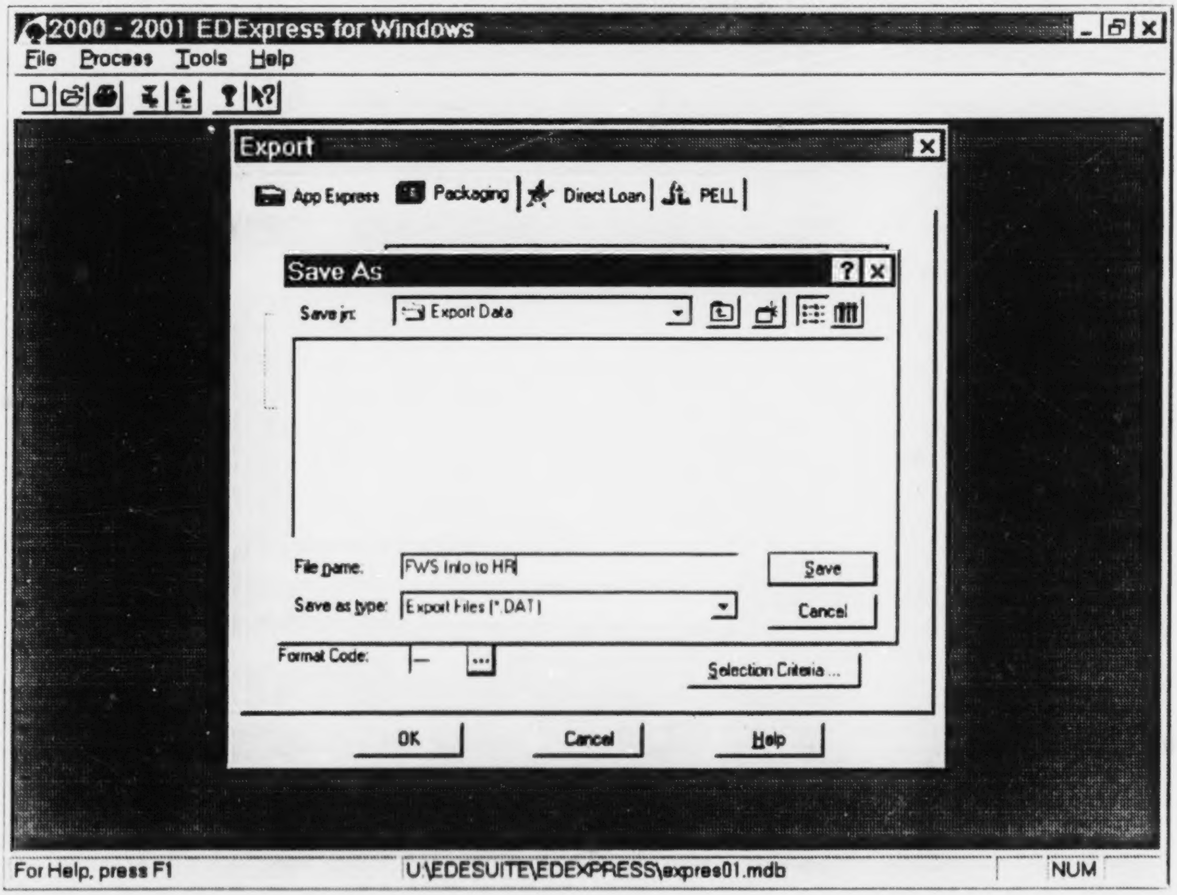
U:\EDESUITE\EDEXPRESS\expres01.mdb

The Save As dialog box displays.

*Confirm that the **Save In** default path is the one you want. If not, enter the desired location that you want the data exported to.*

*Enter a **File Name** for the export file.*

*Click **Save**.*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Export
App Express
Packaging
Direct Loan
PELL
Save As
Format Code:
Selection Criteria ...
OK
Cancel
Help
Save
Cancel
For Help, press F1
NUM

Save in: Export Data

File name: FWS Info to HR

Save as type: Export Files (*.DAT)

U:\EDESUITE\EDEXPRESS\expres01.mdb

*Click the **Export Status** down arrow and select the value B, to indicate that you want to export all student records (those that have been previously exported to an external file as well as those that have not)*

*Click the **Select Delimiter** down arrow and select Fixed Length*

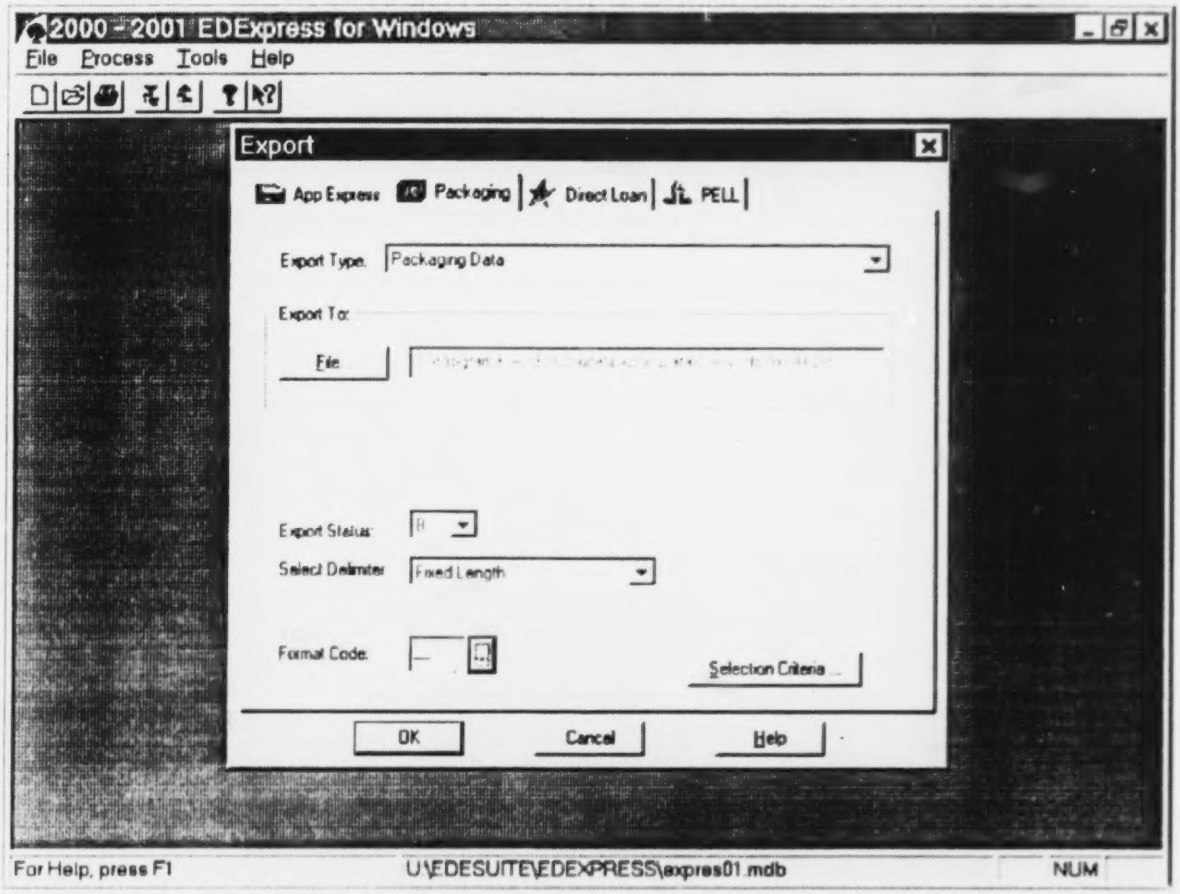
*Click the **Format Code** ellipsis button to select the appropriate format code*

The Export dialog box contains additional export fields that you need to populate

- **Export Status**—Values are Y (yes/ready to export), N (no/not ready to export), or B (both). The system defaults to Y. The Export Status value is associated with the value in the External Export field on the student record Award screen
- NEW! **Select Delimiter**—Values are Fixed Length, Tab Delimited, Comma Delimited, and Custom Delimited. The default value is Fixed Length
- NEW! **Custom Delimiter**—You can define the delimiter to use between fields. This field displays only when you select Custom Delimited under Select Delimiter
- **Format Code**—Values include those you define when creating file formats

Delimiters are any valid keyboard character, except the pipe (|) and underscore (_) symbols, inserted between fields in an ASCII file

[Slide 5-20]


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Export
App Express
Packaging
Direct Loan
PELL
File
Selection Criteria ...
OK
Cancel
Help
For Help, press F1
U:\EDESUITE\EDEXPRESS\expres01.mdb
NUM

Export Type: Packaging Data

Export To:

Export Status: B

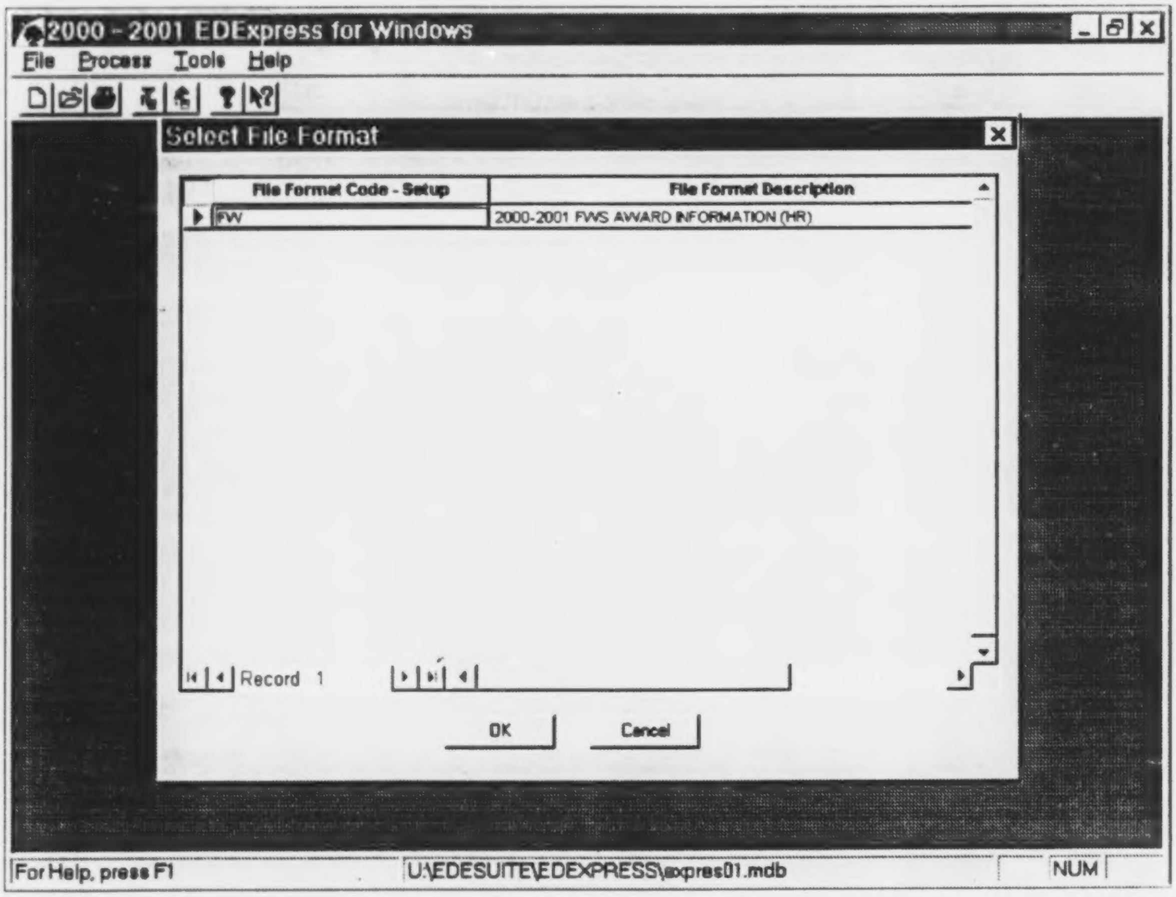
Select Delimiter: Fixed Length

Format Code:

The Select File Format dialog box displays

Highlight the desired record

*Click **OK***

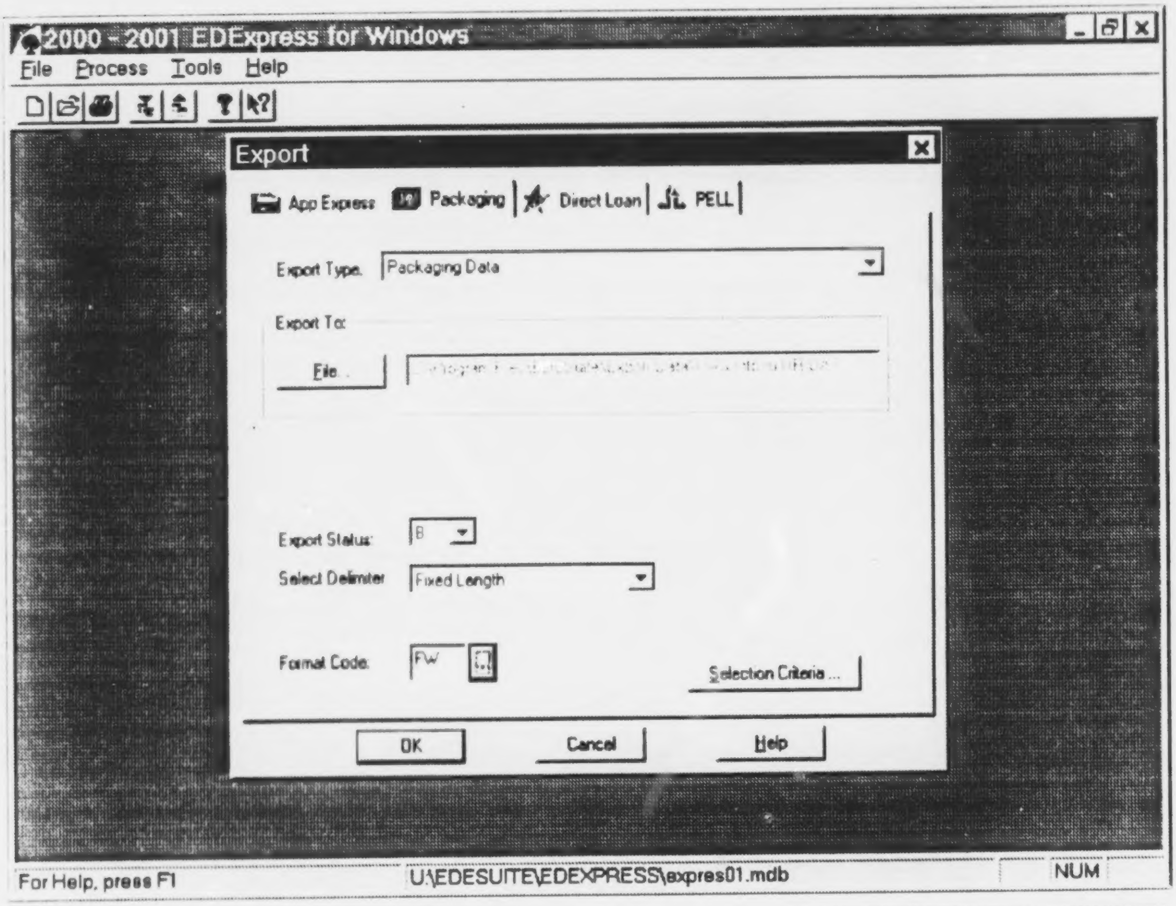


2000 - 2001 EDExpress for Windows
File Process Tools Help
Select File Format

File Format Code - Setup	File Format Description
FW	2000-2001 FWS AWARD INFORMATION (HR)

Record 1
OK
Cancel
For Help, press F1
U:\EDESUITE\EDEXPRESS\expres01.mdb
NUM

Click the ***Selection Criteria*** *button to select the query that identifies the records you want to export*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Export
App Express
Packaging
Direct Loan
PELL
Export To:
File...
Selection Criteria ...
OK
Cancel
Help

Export Type: Packaging Data

Export Status: B

Select Delimiter: Fixed Length

Format Code: FW

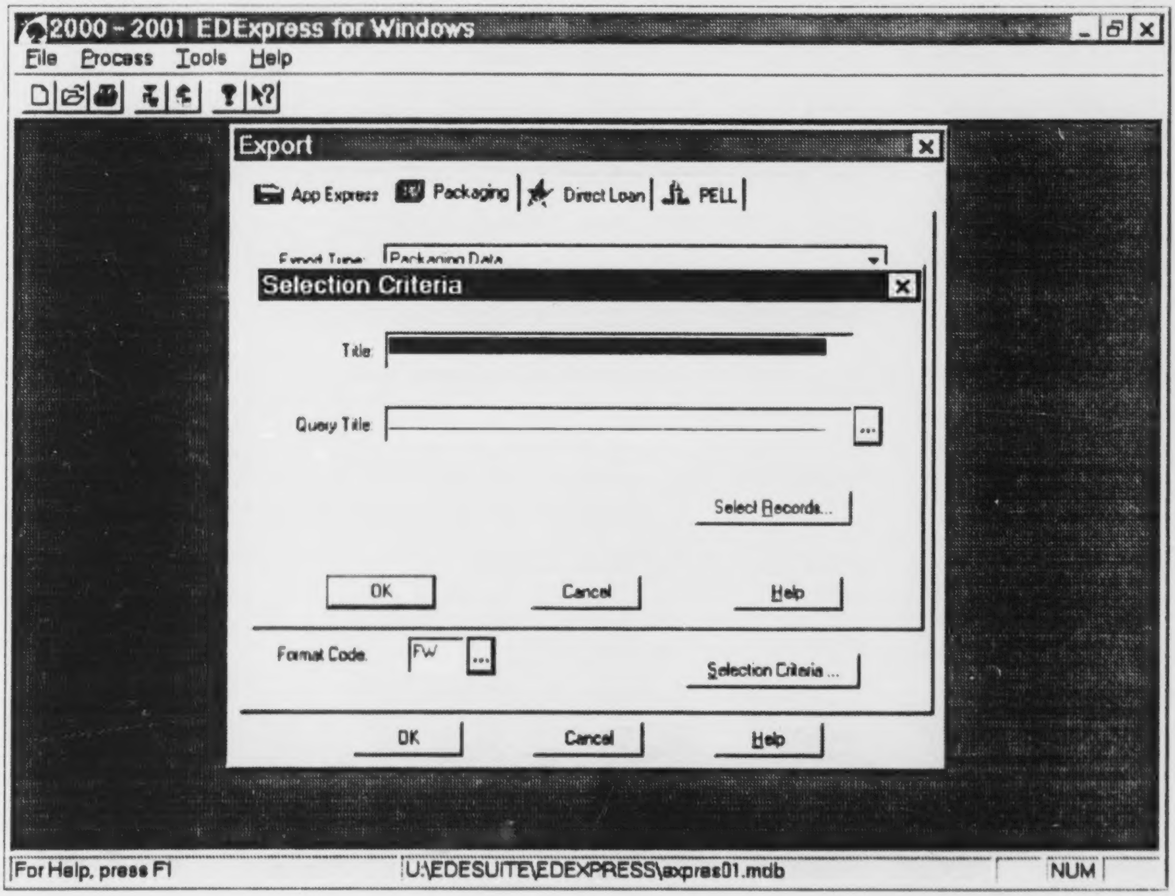
For Help, press F1

U:\EDESUITE\EDEXPRESS\expres01.mdb

NUM

The Selection Criteria dialog box displays

*Click the **Query Title** ellipsis button to display a list of queries*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Export
App Express
Packaging
Direct Loan
PELL
Selection Criteria
Title:
Query Title
...
Select Records...
OK
Cancel
Help
Selection Criteria ...
OK
Cancel
Help
For Help, press F1
NUM

Export Type: Packaging Data

Format Code: FW

U:\EDESUITE\EDEXPRESS\expres01.mdb

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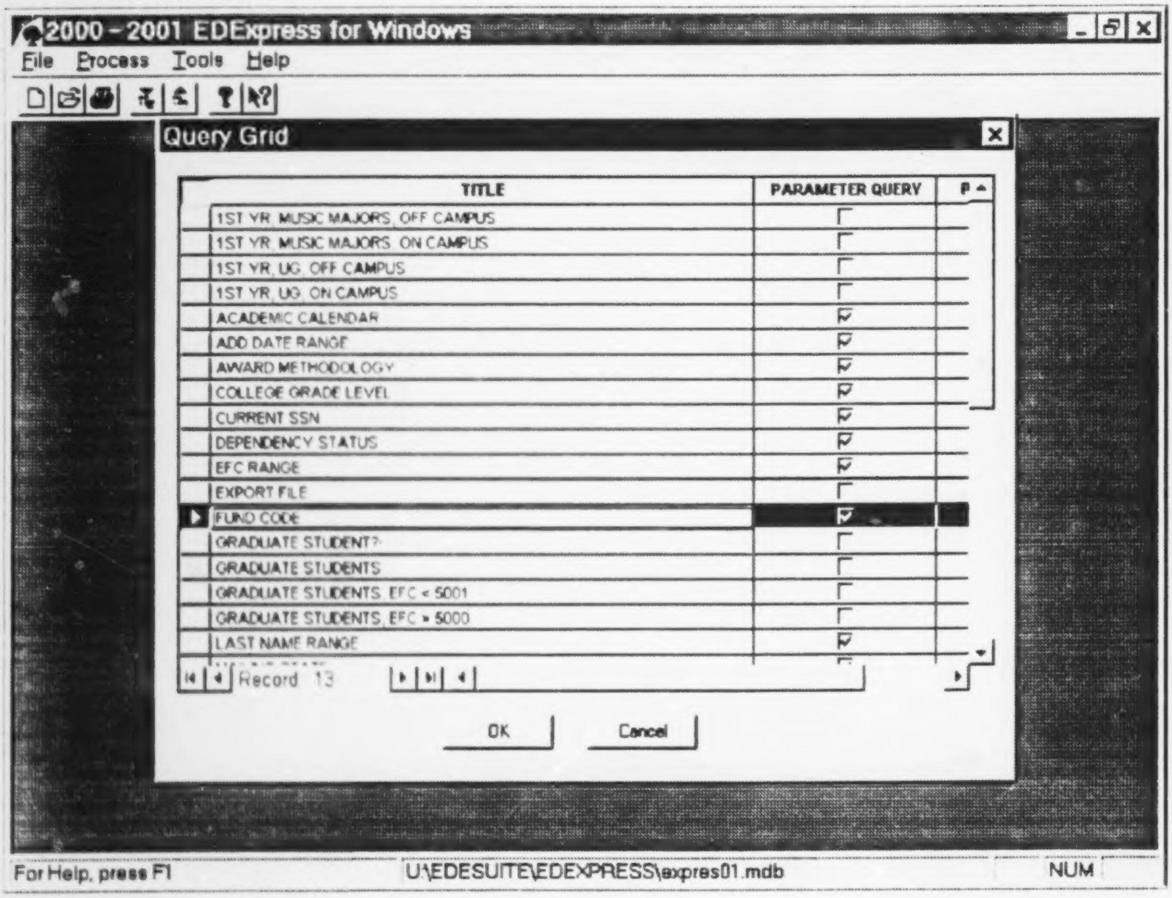
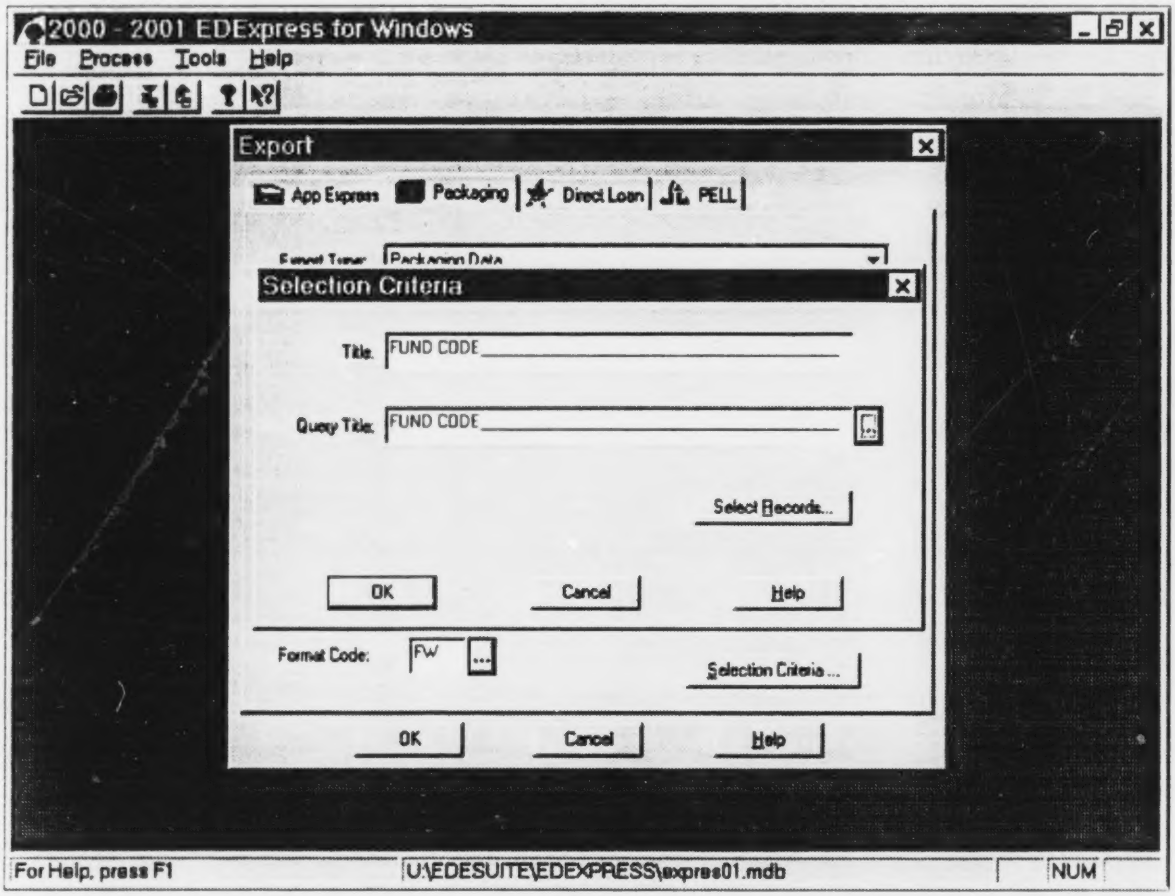
*To limit the population to students awarded Federal Work-Study, select the **Fund Code** parameter query*

*Click **OK***


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Query Grid
Record 13
OK
Cancel
For Help, press F1
U:\EDESUITE\EDEXPRESS\expres01.mdb
NUM

TITLE	PARAMETER QUERY	P
1ST YR, MUSIC MAJORS, OFF CAMPUS	☐	
1ST YR, MUSIC MAJORS, ON CAMPUS	☐	
1ST YR, UG, OFF CAMPUS	☐	
1ST YR, UG, ON CAMPUS	☐	
ACADEMIC CALENDAR	☑	
ADD DATE RANGE	☑	
AWARD METHODOLOGY	☑	
COLLEGE GRADE LEVEL	☑	
CURRENT SSN	☑	
DEPENDENCY STATUS	☑	
EFC RANGE	☑	
EXPORT FILE	☐	
FUND CODE	☑	
GRADUATE STUDENT?	☐	
GRADUATE STUDENTS	☐	
GRADUATE STUDENTS, EFC < 5001	☐	
GRADUATE STUDENTS, EFC > 5000	☐	
LAST NAME RANGE	☑	

*Click **OK** to close the Selection Criteria dialog box*


2000 - 2001 EDExpress for Windows
File Process Tools Help
Export
App Express
Packaging
Direct Loan
PELL
Selection Criteria
Select Records...
OK
Cancel
Help
Selection Criteria ...
OK
Cancel
Help
For Help, press F1
NUM

Export Type: Packaging Data

Title: FUND CODE

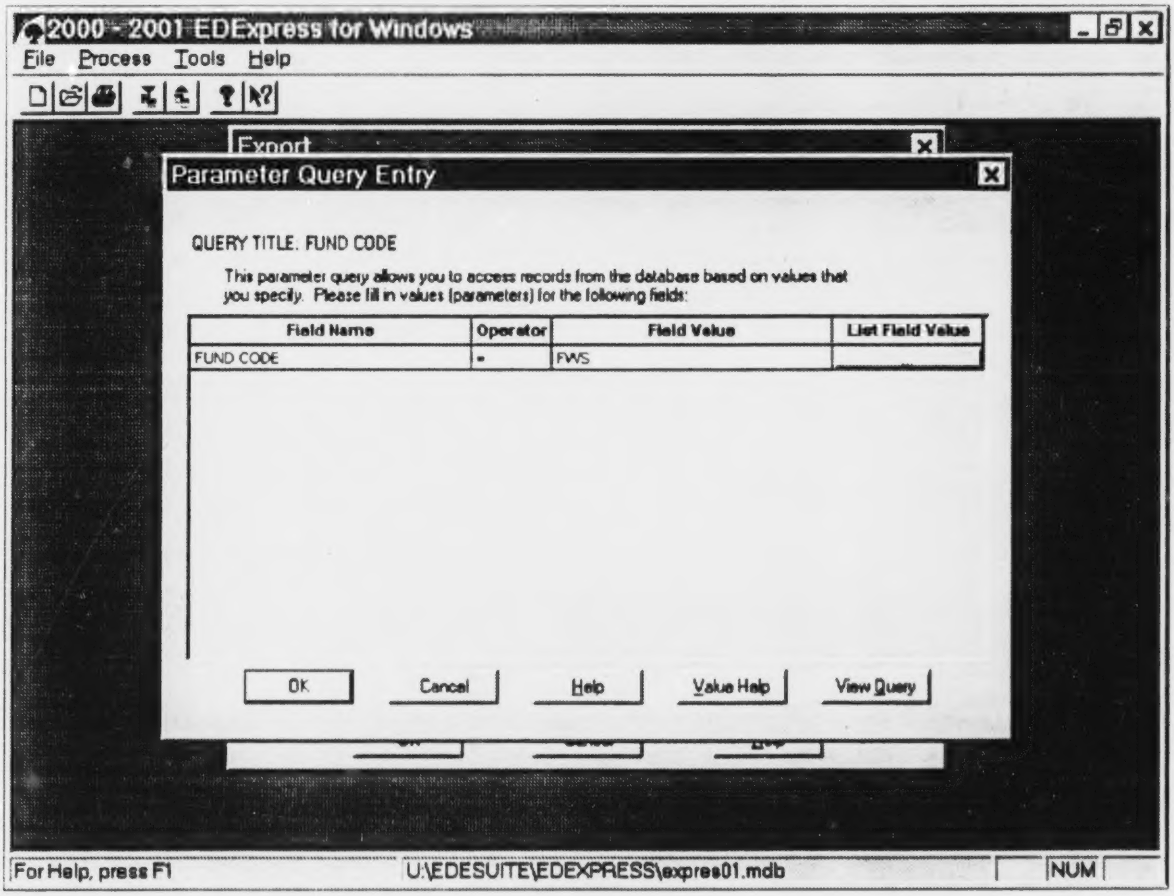
Query Title: FUND CODE

Format Code: FW

U:\EDESUITE\EDEXPRESS\expres01.mdb

The Parameter Query Entry dialog box displays

Enter the Fund Code ***Field Value***



2000 - 2001 EDExpress for Windows
File Process Tools Help
Export
Parameter Query Entry

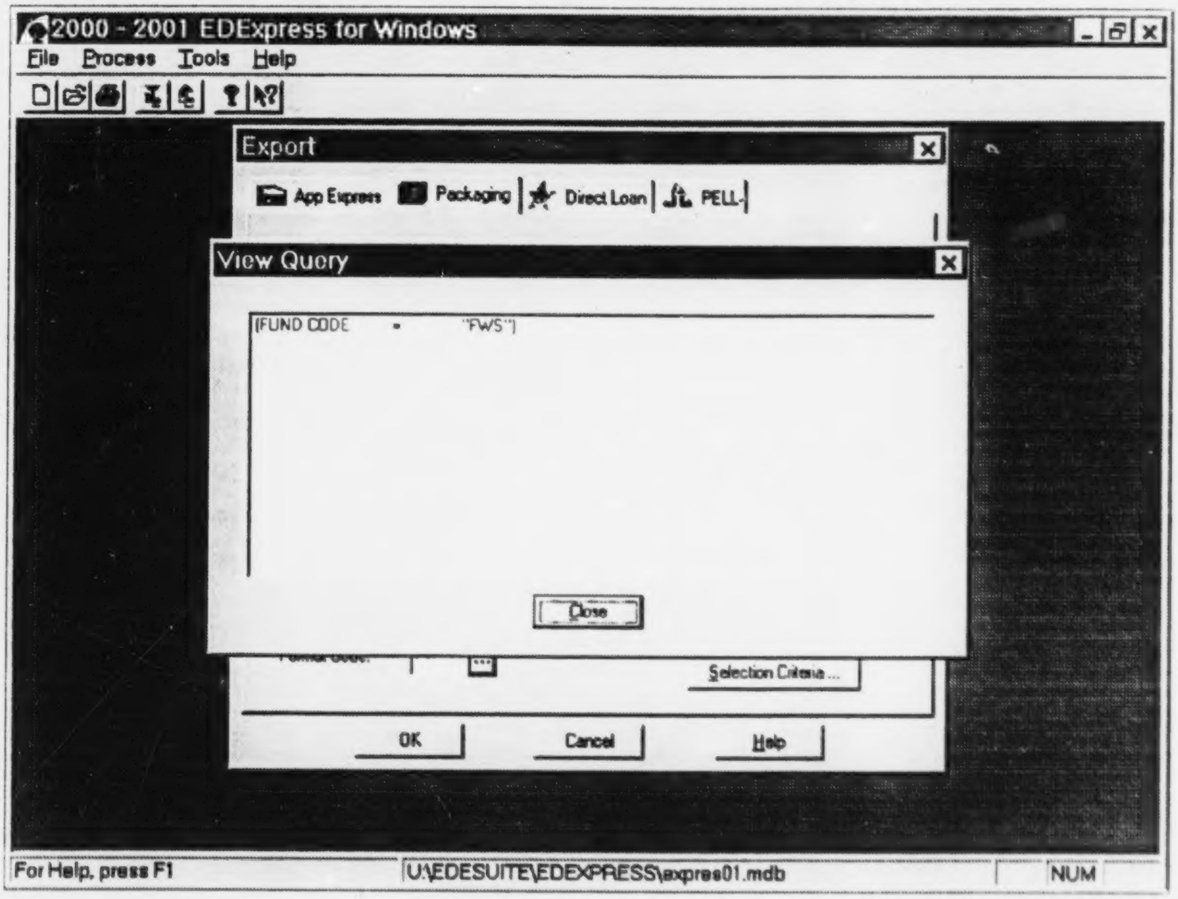
QUERY TITLE: FUND CODE

This parameter query allows you to access records from the database based on values that you specify. Please fill in values (parameters) for the following fields:

Field Name	Operator	Field Value	List Field Value
FUND CODE	=	FWS	

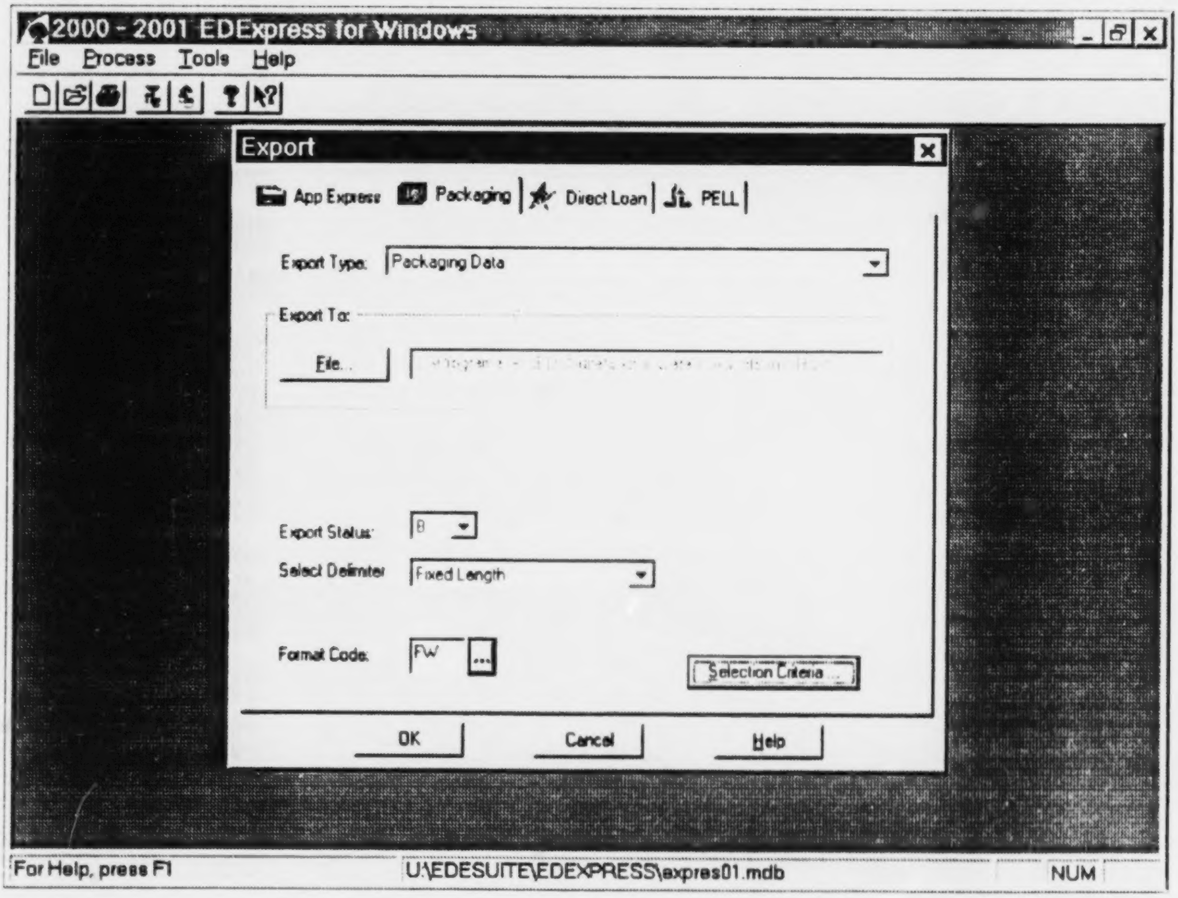
OK
Cancel
Help
Value Help
View Query
For Help, press F1
U:\EDESUITE\EDEXPRESS\expres01.mdb
NUM

Click ***Close*** *to close the View Query dialog box*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Export
App Express
Packaging
Direct Loan
PELL
View Query
Close
Format Code:
Selection Criteria ...
OK
Cancel
Help
For Help, press F1
U:\EDESUITE\EDEXPRESS\expres01.mdb
NUM

```
(FUND CODE     =          "FWS")
```

*Click **OK** to export the data*


2000 - 2001 EDExpress for Windows
File Process Tools Help
Export
App Express
Packaging
Direct Loan
PELL
Export To:
File...
Selection Criteria...
OK
Cancel
Help

Export Type: Packaging Data

Export Status: B

Select Delimiter: Fixed Length

Format Code: FW

For Help, press F1

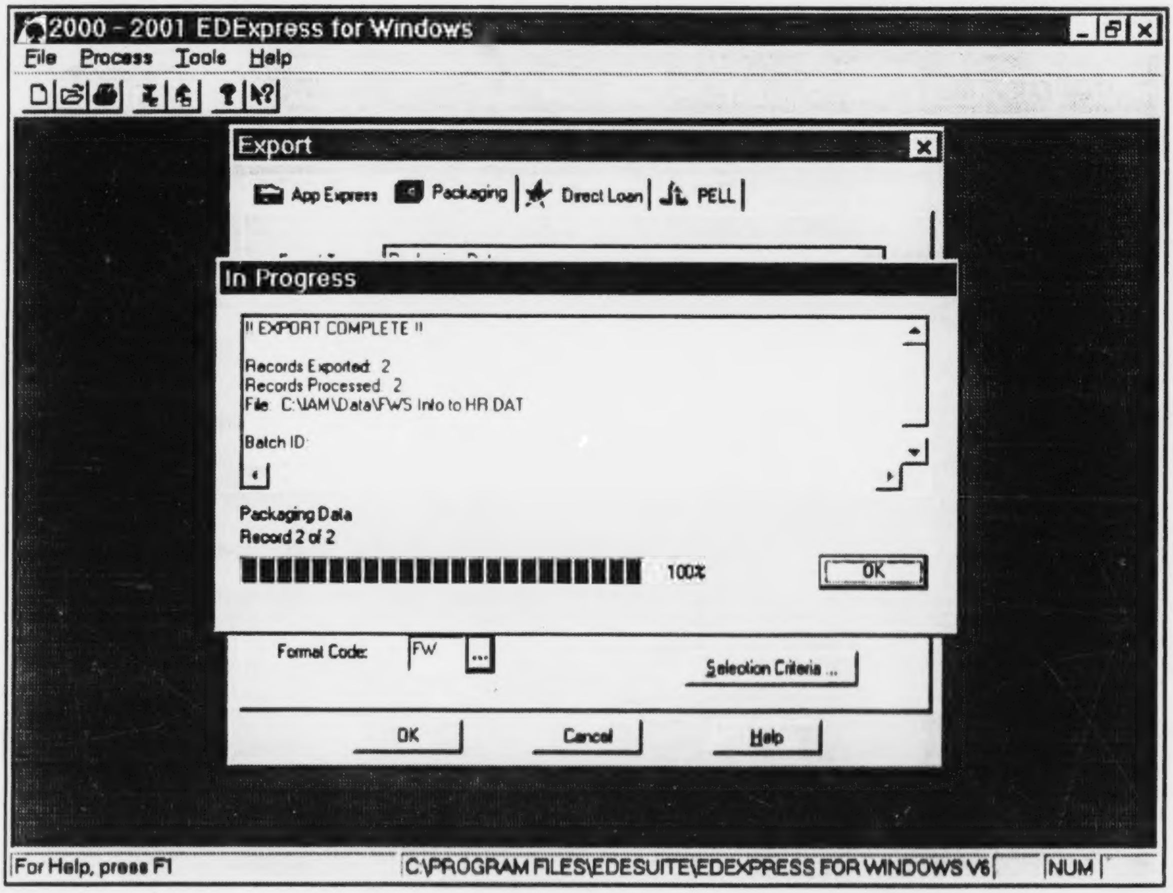
U:\EDESUITE\EDEXPRESS\expres01.mdb

NUM

The In Progress dialog box displays.

Once the export is complete, click ***OK*** *to close the In Progress dialog box.*

Click ***OK*** *to exit the Export function.*


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Export
App Express
Packaging
Direct Loan
PELL
In Progress

```
!! EXPORT COMPLETE !!

Records Exported: 2
Records Processed: 2
File: C:\IAM\Data\FWS Info to HR.DAT

Batch ID:
```

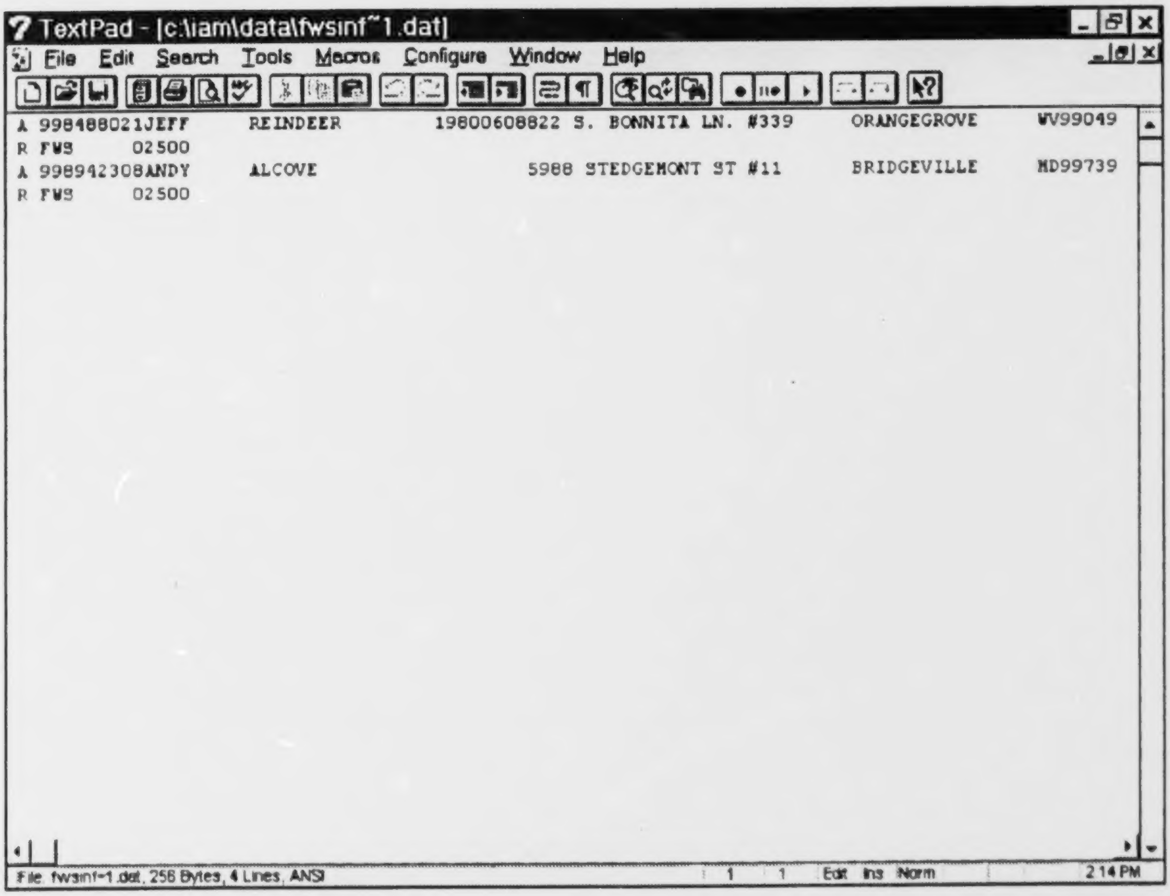
Packaging Data
Record 2 of 2
100%

OK
Selection Criteria ...
OK
Cancel
Help
For Help, press F1
NUM

Format Code: FW

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6

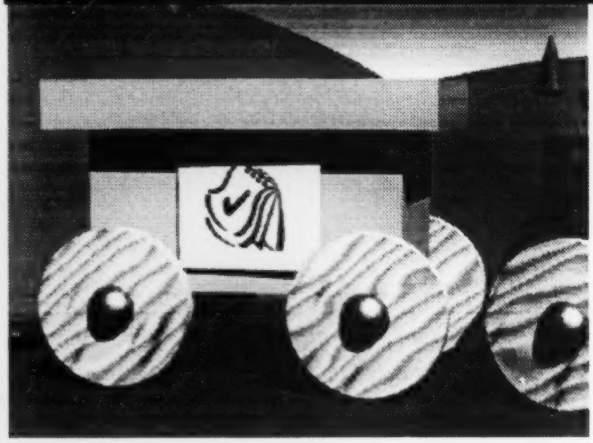
With the use of a text editor, you can view the records and data that have been exported to an external file


TextPad - [c:\iam\data\fwsinf~1.dat]
File
Edit
Search
Tools
Macros
Configure
Window
Help

```
A 998488021JEFF      REINDEER        19800608822 S. BONNITA LN. #339     ORANGEGROVE      WV99049
R FWS       02500
A 998942308ANDY      ALCOVE                  5988 STEDGEMONT ST #11      BRIDGEVILLE      MD99739
R FWS       02500
```

File: fwsinf~1.dat, 256 Bytes, 4 Lines, ANSI
1
1
Edit
Ins
Norm
2:14 PM

Unit 6



Reports

This unit describes reports available in EDExpress to help you manage the packaging process as well as administer your financial aid programs.

Although the EDExpress reporting function doesn't include user-defined reports, expert Microsoft Access users should have no problem creating and generating custom reports using Access.

Table of Contents

Lesson 1: Reports in EDExpress 6-3

Objectives

1. Identify system-defined reports that assist with financial aid managment
2. Differentiate between Global reports and Packaging reports

[Slide 6-2]

Reports in EDExpress

EDExpress features a number of different reports within each module. These reports are accessed via the Print function. The reports associated with packaging functions are printed via the Packaging module, while those associated with document tracking are printed via the Global module.

Packaging Reports

EDExpress features the following reports under the Packaging module. Most include a Selection Criteria option to allow you to select specific records. Most give you the option to sort the data alphabetically or by SSN.

- FISAP Eligible Dependent Students
- FISAP Eligible Independent Students
- Letters Award
- List-Entered Packaging Records
- List-Fund Maintenance
- List-Packaged Students by Fund Code
- List-Packaged Students
- List-Unpackaged Students
- Measurement Tools - Funds
- Packaging Record
- Packaging Setup
- Record Layout – Import External Add
- Record Layout – Import External Change
- Record Layout – User Defined Formats
- Record Layout – Change Field Numbers
- Record Layout – Import Add Fund Amounts

FISAP-Eligible Dependent Students

This report provides a summary of the distribution by income of all dependent eligible aid applicants in the Packaging database. This report is useful when preparing Section E of the FISAP.

FISAP-Eligible Independent Students

This report provides a summary of the distribution by income of all independent eligible aid applicants in the Packaging database. This report is useful when preparing Section E of the FISAP.

[Slide 6-3]

List-Entered Packaging Records

This report provides a listing of all students in the Packaging database without regard to their packaging status.

List-Packaged Students

This report includes all students with a packaging status of P (Packaged), H (Hand Packaged), or M (Manually Packaged) and provides detailed packaging and award information. You have the option to sort the list by last name, SSN, EFC, or index, as well as the option to include students packaged with no awards.

List-Unpackaged Students

This listing includes any student whose packaging status is not equal to P (Packaged), H (Hand Packaged), or M (Manually Packaged) to help you determine those students who still need to be packaged.

List-Packaged Students by Fund Code

This report includes a list of students packaged from one or more funds you designate. The report lists SSNs, names, award amounts, and a summary total of the amount awarded from each fund. The information is first sorted according to Fund Code, then according to SSNs within each fund code.

List-Fund Maintenance

The Fund Maintenance List provides real time information about total amounts awarded from each fund.

Measurement Tools - Funds

This report lists the totals awarded by aid type along with the number and percentage of students who receive funds from each aid type. The number of aid applicants reported is actually the same number of student records in the Packaging database.

Packaging Record

The Packaging Record report provides a one-page summary of the student's demographic information as well as most of the information listed on the student's Award screen. You can use this option to print either a multiple Packaging Record Reports or a single report by entering an individual SSN. You also can print a single Packaging Record Report from an open student record.

Packaging Setup

This report provides the details of all setups you entered in the Packaging module.

[Slides 6-4 through 6-6]

Packaging Record Layouts

The record layout option allows you to print the most current version of individual record layouts used in the EDExpress Packaging system for various import/export files. The report includes the field name, field length, field type, as well as start and end positions for each field.

The following individual record layouts are available in the Packaging module:

- Record Layout - Import External Add
- Record Layout - Import External Change
- Record Layout – User Defined Formats
- Record Layout – Change Field Numbers
- Record Layout – Import Add Fund Amounts

[Slide 6-7]

Global Reports

The Global module of EDExpress features the following reports to help you manage document tracking, queries, and user data:

- Document Tracking by Document Code List
- Document Tracking by Student List
- Document Tracking Letter
- Setup Document Tracking
- Query Management List
- User Data Report
- User-Defined Letters
- User-Defined Queries List
- Global Record Layouts

Document Tracking by Document Code List

Sorted by Document Code, this report includes a detailed listing, as well as the total number, of students assigned individual documents. For each student record, the report also lists the document received date.

Document Tracking by Student List

Sorted by student, this report provides a listing of all documents assigned to each student, document received dates, and the subtotals of the number of documents assigned to each student record. The report also includes a total of all student records in the Document Tracking database as well as a total of all documents assigned.

Setup-Document Tracking

This report provides the details of all the documents you setup in the Global module. You have the option to generate the report by document code or by year.

Query Management List

By EDExpress module, this option generates a list of the queries in the database. The report also indicates which queries are parameter queries as well as which are predefined by EDExpress.

User Data Report

The User Data Report shows the user-defined fields that you create in Global System Setup and the values entered in the database for each student, listed by SSN. You can generate this report for individual students, groups of students, or all students, depending on the selection criteria you use. You can also select specific user-defined fields to include.

Global Record Layouts

The record layout option allows you to print the most current version of record layouts used in the Global module to import User Data and Demographic Data files. The report includes the field name, field length, field type, as well as start and end positions for each field.

User-Defined Queries List

The User-Defined Queries List is a list of the queries you've created for ISIRs, Packaging, Direct Loan, and Pell.

[Slides 6-8 through 6-10]

Printing the List-Packaged Students by Fund Code Report

You can print the report to File, Printer or Screen

You can indicate an SSN file to print report for a set of students

You can click the ellipses to select a single fund, or leave it blank to select all funds. To select more than one fund but less than all, create a query that selects only the funds you want

You can click Selection Criteria to choose a query created in the Packaging database

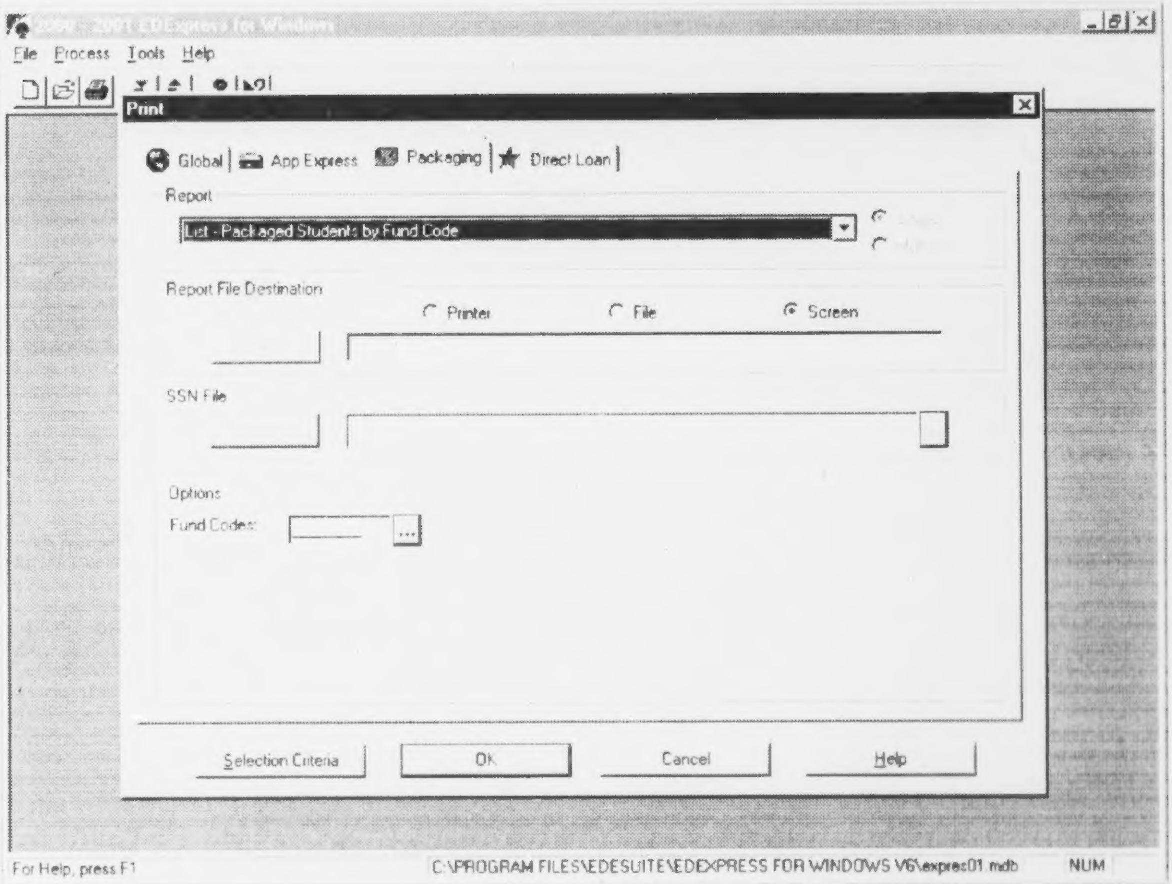
*Select **File/Print** from the menu*

*Click the **Packaging** tab (if not the default)*

*Select **List-Packaged Students by Fund Code***

*Select **Print to Screen***

*Click **OK***


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Print
Global
App Express
Packaging
Direct Loan
Report File Destination
SSN File
Options
Selection Criteria
OK
Cancel
Help
For Help, press F1
NUM

Report: List - Packaged Students by Fund Code

Report File Destination: ○ Printer ○ File ● Screen

Fund Codes:

C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb

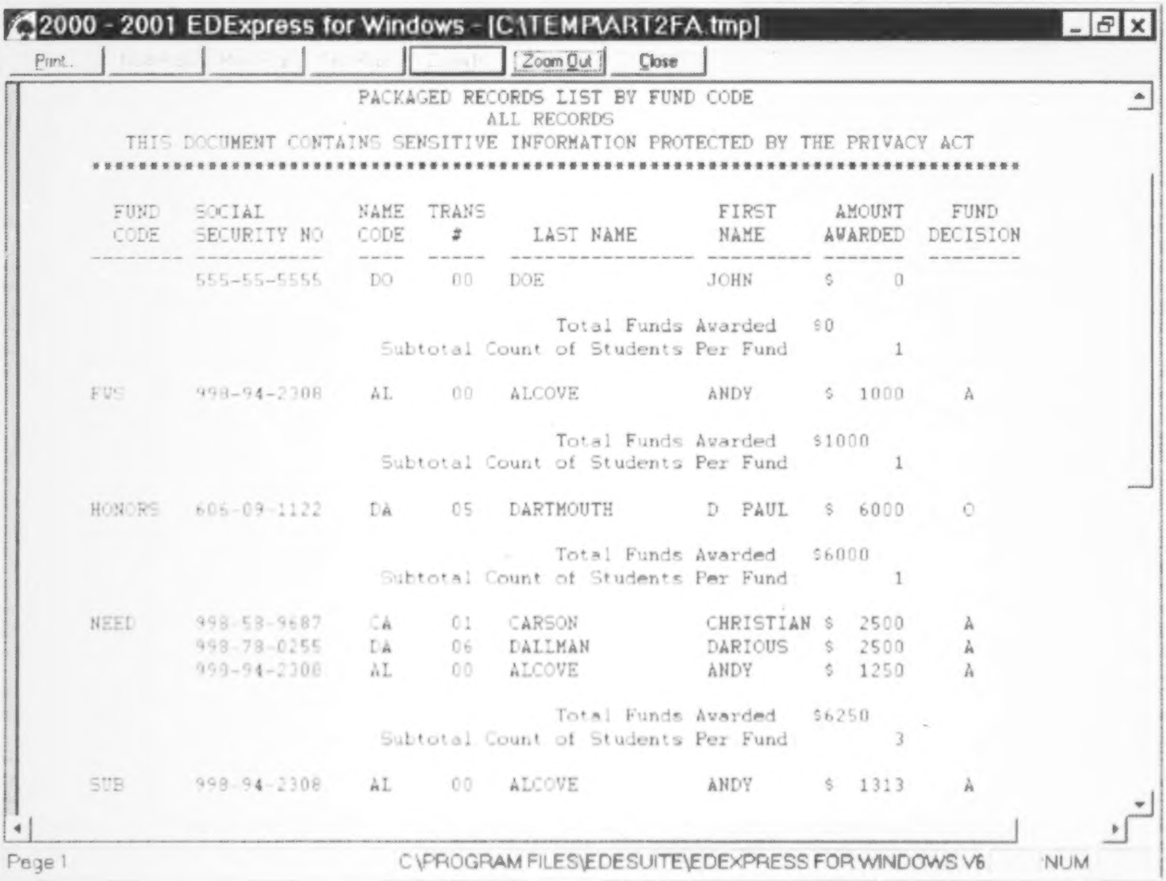
BEST COPY AVAILABLE

Zoom in for a closer look at the report

*Click **Next Page** to scroll through pages*

The report shows Fund Code, Social Security #, Name ID, Transaction Number, Amount Awarded, and Fund Decision Code.

If you select more than one fund, the report sorts by SSN within Fund, and includes subtotals for each fund. An unduplicated student count is provided at the end of the report.


2000 - 2001 EDExpress for Windows - [C:\TEMP\ART2FA.tmp]
Print..
Zoom Out
Close
Page 1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6
NUM

```
                        PACKAGED RECORDS LIST BY FUND CODE
                                   ALL RECORDS
     THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
*********************************************************************************

  FUND    SOCIAL          NAME  TRANS                     FIRST     AMOUNT   FUND
  CODE    SECURITY NO     CODE    #       LAST NAME       NAME      AWARDED  DECISION
-------- -----------      ----  -----  ---------------- --------- -------  --------
          555-55-5555      DO     00   DOE               JOHN      $     0

                                        Total Funds Awarded   $0
                               Subtotal Count of Students Per Fund        1

FWS       998-94-2308      AL     00   ALCOVE            ANDY      $  1000      A

                                        Total Funds Awarded   $1000
                               Subtotal Count of Students Per Fund        1

HONORS    606-09-1122      DA     05   DARTMOUTH         D  PAUL   $  6000      O

                                        Total Funds Awarded   $6000
                               Subtotal Count of Students Per Fund        1

NEED      998-58-9687      CA     01   CARSON            CHRISTIAN $  2500      A
          998-78-0255      DA     06   DALLMAN           DARIOUS   $  2500      A
          999-94-2308      AL     00   ALCOVE            ANDY      $  1250      A

                                        Total Funds Awarded   $6250
                               Subtotal Count of Students Per Fund        3

SUB       998-94-2308      AL     00   ALCOVE            ANDY      $  1313      A
```

Printing the List-Entered Packaging Records Report

You can print the report to File, Printer or Screen.

You can indicate an SSN file to print the report for a set of students.

You have the option to include students packaged without funds.

You can sort the report by SSN (Social Security Number), Last Name, EFC (Expected Family Contribution), or Index-P (Processed Date).

You can click Selection Criteria to use a query created in the Packaging database to select records.

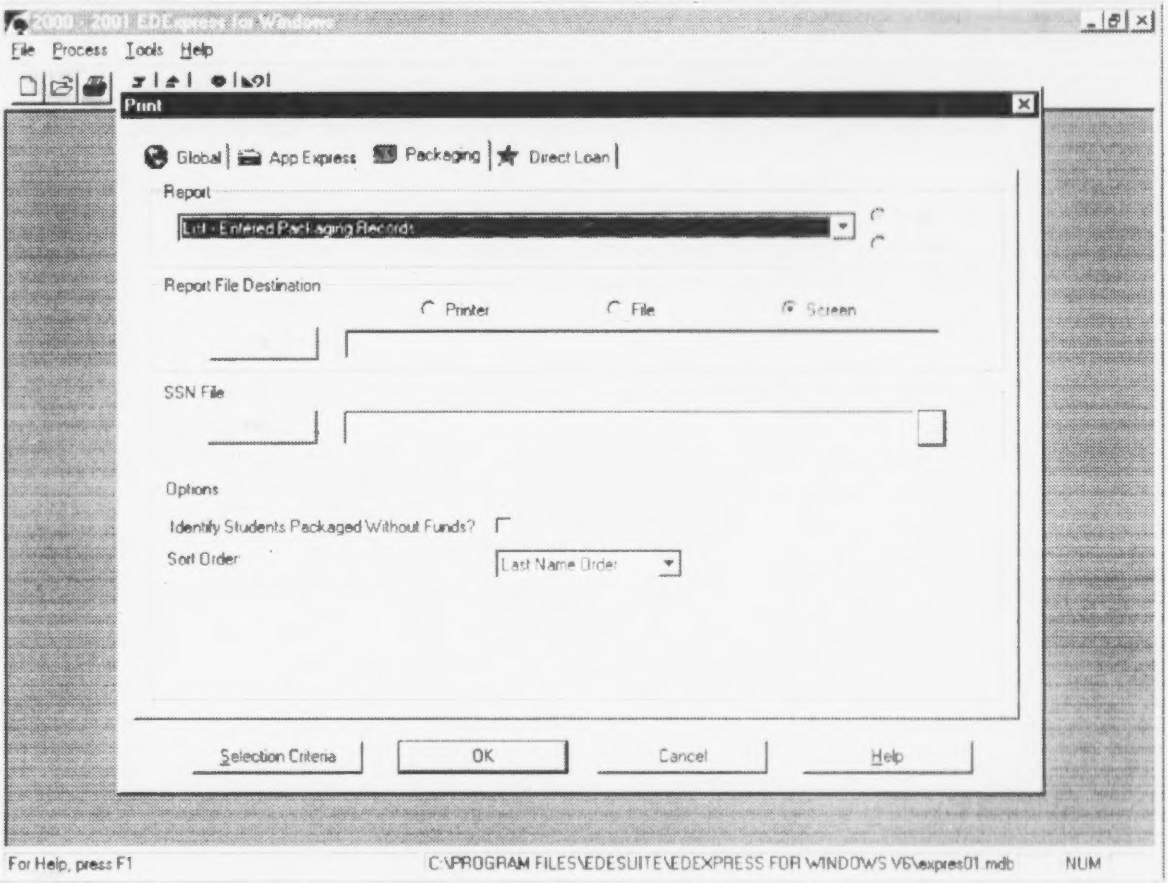
*Select **File/Print** from the menu*

*Click the **Packaging** tab*

*Select **List-Entered Packaging Records***

*Select **Print to Screen***

*Click **OK***


2000 - 2001 EDExpress for Windows
File
Process
Tools
Help
Print
Global
App Express
Packaging
Direct Loan
Selection Criteria
OK
Cancel
Help

Report: List - Entered Packaging Records

Report File Destination: ○ Printer ○ File ● Screen

SSN File

Options

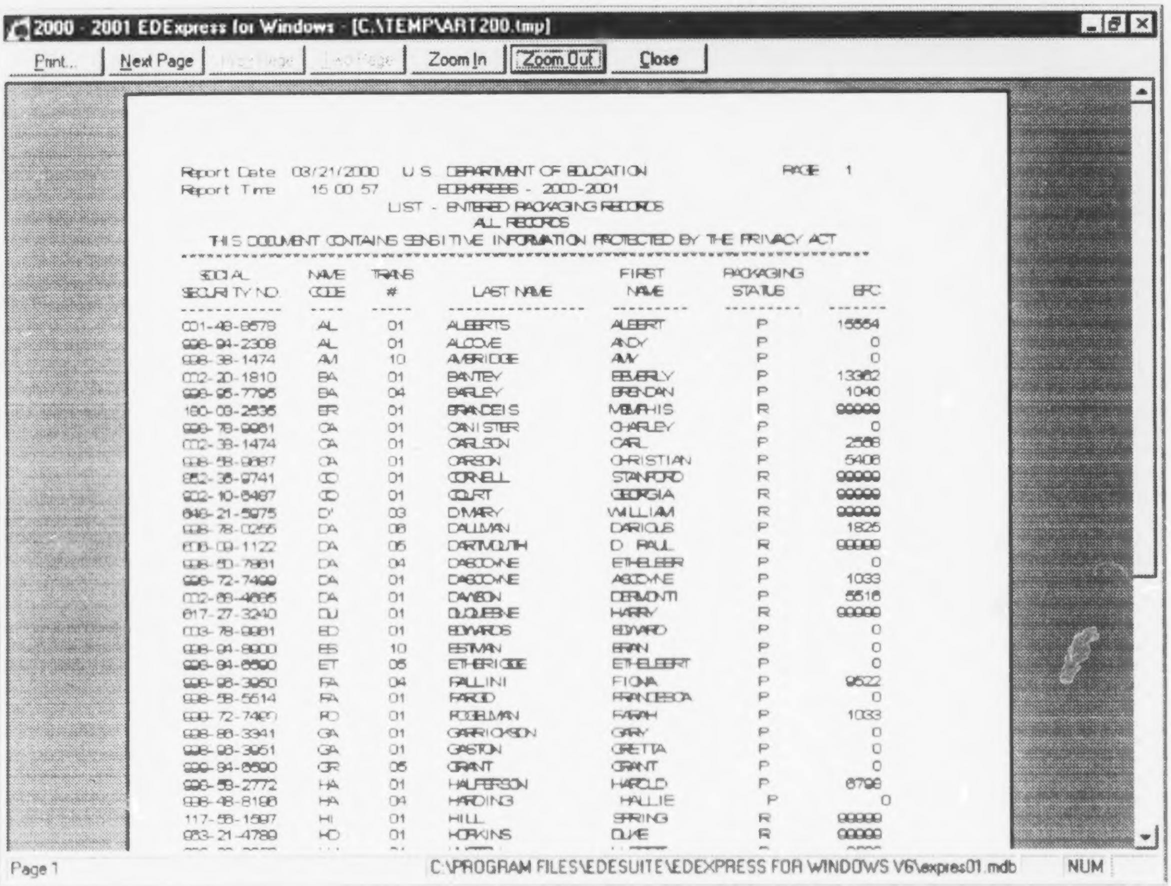
Identify Students Packaged Without Funds? ☐

Sort Order: Last Name Order

For Help, press F1 C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb NUM

Zoom in for a closer look at the report

The report shows Social Security #, Name ID, Transaction Number, Packaging Status and EFC.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Last Page
Zoom In
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Page 1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

```
Report Date  03/21/2000   U S  DEPARTMENT OF EDUCATION                PAGE   1
Report Time    15 00 57        EDEXPRESS - 2000-2001
                         LIST - ENTERED PACKAGING RECORDS
                                    ALL RECORDS
   THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
********************************************************************************
   SOCIAL        NAME   TRANS                          FIRST      PACKAGING
SECURITY NO.     CODE     #         LAST NAME           NAME        STATUS      EFC
------------     ----   -----   ---------------     ---------   ---------   -------
001-48-8678       AL     01     ALBERTS              ALBERT         P         15664
998-94-2308       AL     01     ALCOVE               ANDY           P             0
998-38-1474       AM     10     AMBRIDGE             AMY            P             0
002-20-1810       BA     01     BANTEY               BEVERLY        P         13362
998-95-7795       BA     04     BARLEY               BRENDAN        P          1040
180-03-2536       BR     01     BRANDEIS             MEMPHIS        R         99999
998-78-9981       CA     01     CANISTER             CHARLEY        P             0
002-38-1474       CA     01     CARLSON              CARL           P          2588
998-58-9887       CA     01     CARSON               CHRISTIAN      P          5408
852-38-9741       CO     01     CORNELL              STANFORD       R         99999
902-10-8487       CO     01     COURT                GEORGIA        R         99999
848-21-5975       D'     03     D'MARY               WILLIAM        R         99999
998-78-0256       DA     08     DALLMAN              DARIOUS        P          1825
808-09-1122       DA     05     DARTMOUTH            D  PAUL        R         99999
998-50-7881       DA     04     DASCOYNE             ETHELBER       P             0
998-72-7499       DA     01     DASCOYNE             ASCOYNE        P          1033
002-88-4885       DA     01     DAWSON               DERMONTI       P          5518
817-27-3240       DU     01     DUQUESNE             HARRY          R         99999
003-78-9881       ED     01     EDWARDS              EDWARD         P             0
998-94-8900       ES     10     ESTMAN               BRIAN          P             0
998-84-8590       ET     05     ETHERIDGE            ETHELBERT      P             0
998-98-3950       FA     04     FALLINI              FIONA          P          9522
998-58-5614       FA     01     FARGO                FRANCESCA      P             0
998-72-7489       FO     01     FOGELMAN             FARAH          P          1033
998-88-3341       GA     01     GARRICKSON           GARY           P             0
998-98-3951       GA     01     GASTON               GRETTA         P             0
999-94-8590       GR     05     GRANT                GRANT          P             0
998-58-2772       HA     01     HALPERSON            HAROLD         P          8798
998-48-8198       HA     04     HARDING               HALLIE          P            0
117-58-1587       HI     01     HILL                 SPRING         R         99999
983-21-4789       HO     01     HOPKINS              DUKE           R         99999
```

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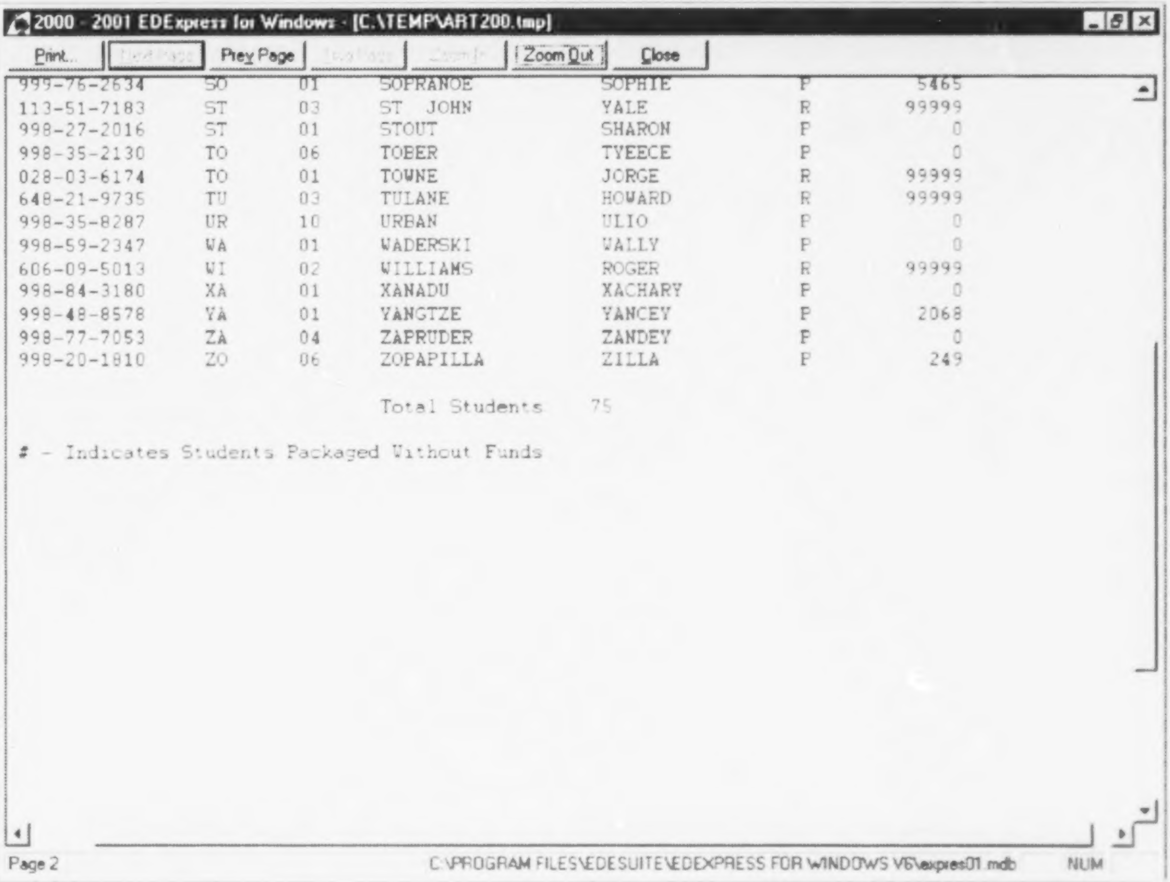
A summary is provided at the end of the report.

*Click **Next Page** until you reach the last page.*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Two Page
Zoom In
Zoom Out
Close
Page 2
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

```
999-76-2634   SO    01    SOPRANOE       SOPHIE         P     5465
113-51-7183   ST    03    ST  JOHN       YALE           R    99999
998-27-2016   ST    01    STOUT          SHARON         P        0
998-35-2130   TO    06    TOBER          TYEECE         P        0
028-03-6174   TO    01    TOWNE          JORGE          R    99999
648-21-9735   TU    03    TULANE         HOWARD         R    99999
998-35-8287   UR    10    URBAN          ULIO           P        0
998-59-2347   WA    01    WADERSKI       WALLY          P        0
606-09-5013   WI    02    WILLIAMS       ROGER          R    99999
998-84-3180   XA    01    XANADU         XACHARY        P        0
998-48-8578   YA    01    YANGTZE        YANCEY         P     2068
998-77-7053   ZA    04    ZAPRUDER       ZANDEY         P        0
998-20-1810   ZO    06    ZOPAPILLA      ZILLA          P      249

                          Total Students    75

# - Indicates Students Packaged Without Funds
```

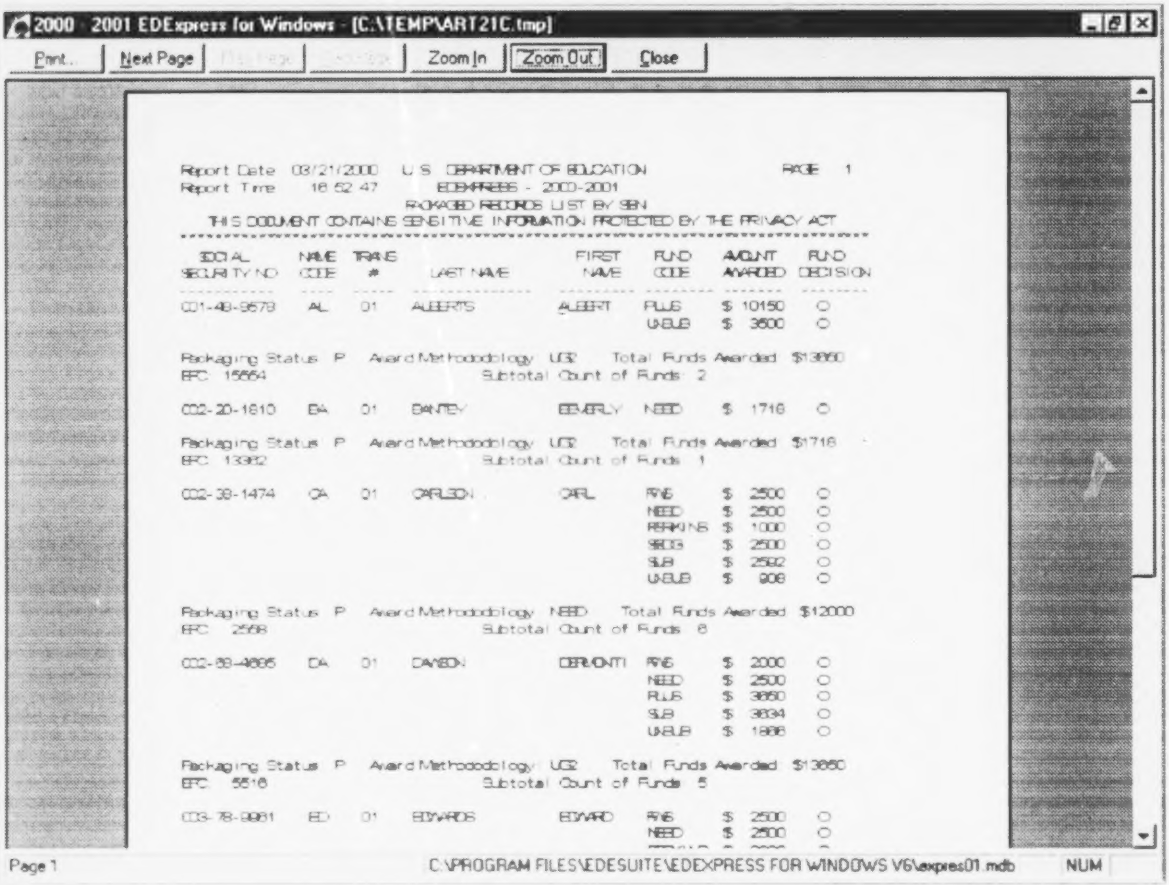
Printing the List-Packaged Students Report

You can sort the report by SSN (Social Security Number), Last Name, EFC (Expected Family Contribution), or Index-P (Processed Date)*

This report is printed using the same method as other packaging reports.

It displays Social Security #, Name ID, Transaction Number, Fund Code, Amount Awarded, Fund Decision, Packaging Status, Award Methodology, Total Funds Awarded, EFC and Subtotal Count of Funds for each student.

*Although Processed Date is not shown on report, it is available as a sort option.


2000 - 2001 EDExpress for Windows - [C:\TEMP\ART21C.tmp]
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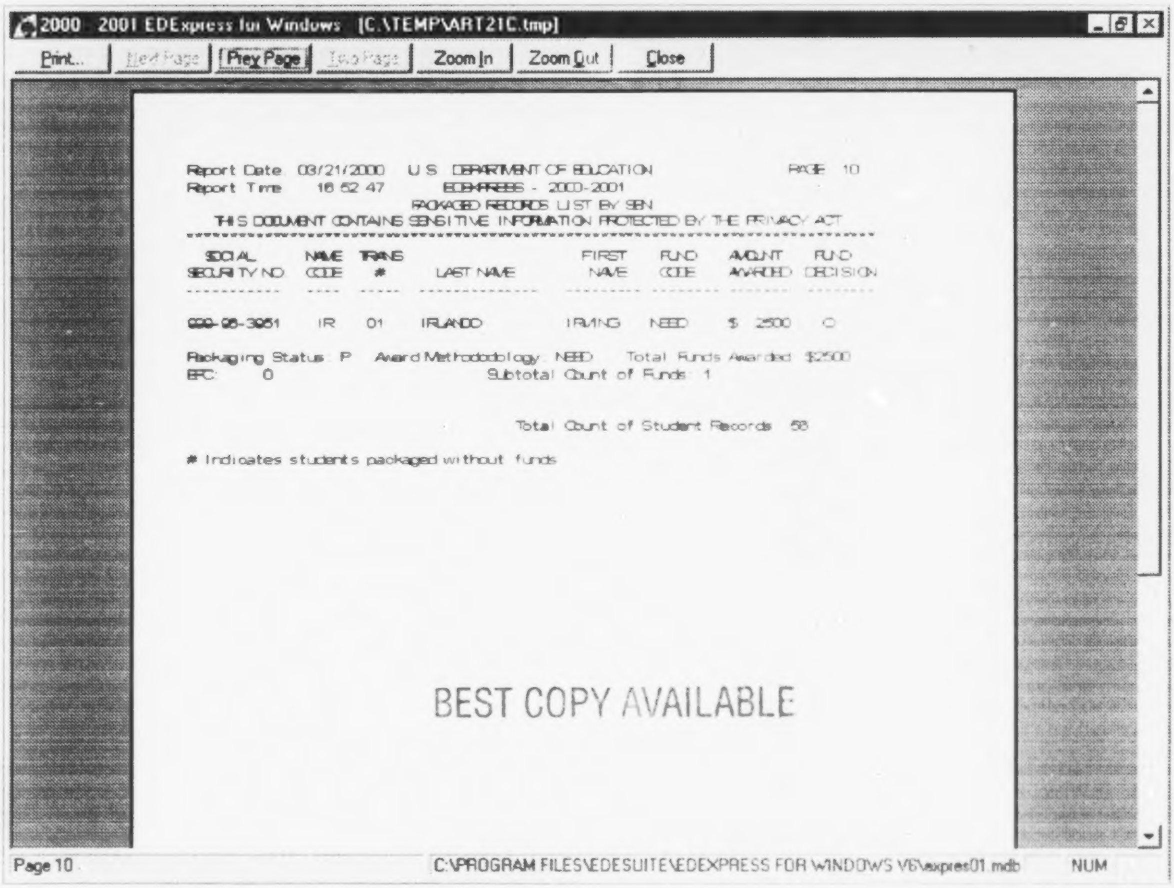
Zoom In
Zoom Out
Close
Page 1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

```
Report Date  03/21/2000   U.S. DEPARTMENT OF EDUCATION              PAGE  1
Report Time    18 52 47        EDEXPRESS - 2000-2001
                               PACKAGED RECORDS LIST BY SSN
   THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
*****************************************************************************
  SOCIAL       NAME  TRANS                          FIRST    FUND     AMOUNT   FUND
SECURITY NO    CODE    #        LAST NAME           NAME     CODE     AWARDED  DECISION
-----------    ----  -----   ----------------     --------  -------   -------  --------
001-48-9578     AL     01    ALBERTS              ALBERT    PLUS     $ 10150      O
                                                            UNSUB    $  3600      O

Packaging Status  P   Award Methododology  UG2    Total Funds Awarded  $13860
EFC  15664                          Subtotal Count of Funds: 2

002-20-1810     BA     01    BANTEY               BEVERLY   NEED     $  1716      O

Packaging Status  P   Award Methododology  UG2    Total Funds Awarded  $1716
EFC  13382                          Subtotal Count of Funds  1

002-38-1474     CA     01    CARLSON              CARL      PNG      $  2500      O
                                                            NEED     $  2500      O
                                                            PERKINS  $  1000      O
                                                            SEOG     $  2500      O
                                                            SUB      $  2592      O
                                                            UNSUB    $   908      O

Packaging Status  P   Award Methododology  NEED    Total Funds Awarded  $12000
EFC   2568                          Subtotal Count of Funds  6

002-88-4886     DA     01    DAWSON               DERMONTI  PNG      $  2000      O
                                                            NEED     $  2500      O
                                                            PLUS     $  3860      O
                                                            SUB      $  3834      O
                                                            UNSUB    $  1866      O

Packaging Status  P   Award Methododology  UG2    Total Funds Awarded  $13860
EFC   5516                          Subtotal Count of Funds  5

003-78-9981     ED     01    EDWARDS              EDWARD    PNG      $  2500      O
                                                            NEED     $  2500      O
```

The summary at end of the report provides the total count of student records.

Scroll to last page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Page 10
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
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Report Date 03/21/2000   U S  DEPARTMENT OF EDUCATION              PAGE  10
Report Time    16 52 47       EDEXPRESS - 2000-2001
                          PACKAGED RECORDS LIST BY SSN
   THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
****************************************************************************
  SOCIAL       NAME  TRANS                        FIRST    FUND     AMOUNT   FUND
SECURITY NO    CODE    #      LAST NAME            NAME     CODE    AWARDED  DECISION
-----------    ----  -----  -------------       --------- -------- ------- --------

999-98-3951     IR    01    IRLANDO             IRVING    NEED     $ 2500     O

Packaging Status  P   Award Methodology  NEED     Total Funds Awarded  $2500
EFC      0                            Subtotal Count of Funds  1


                                      Total Count of Student Records  58

# Indicates students packaged without funds
```

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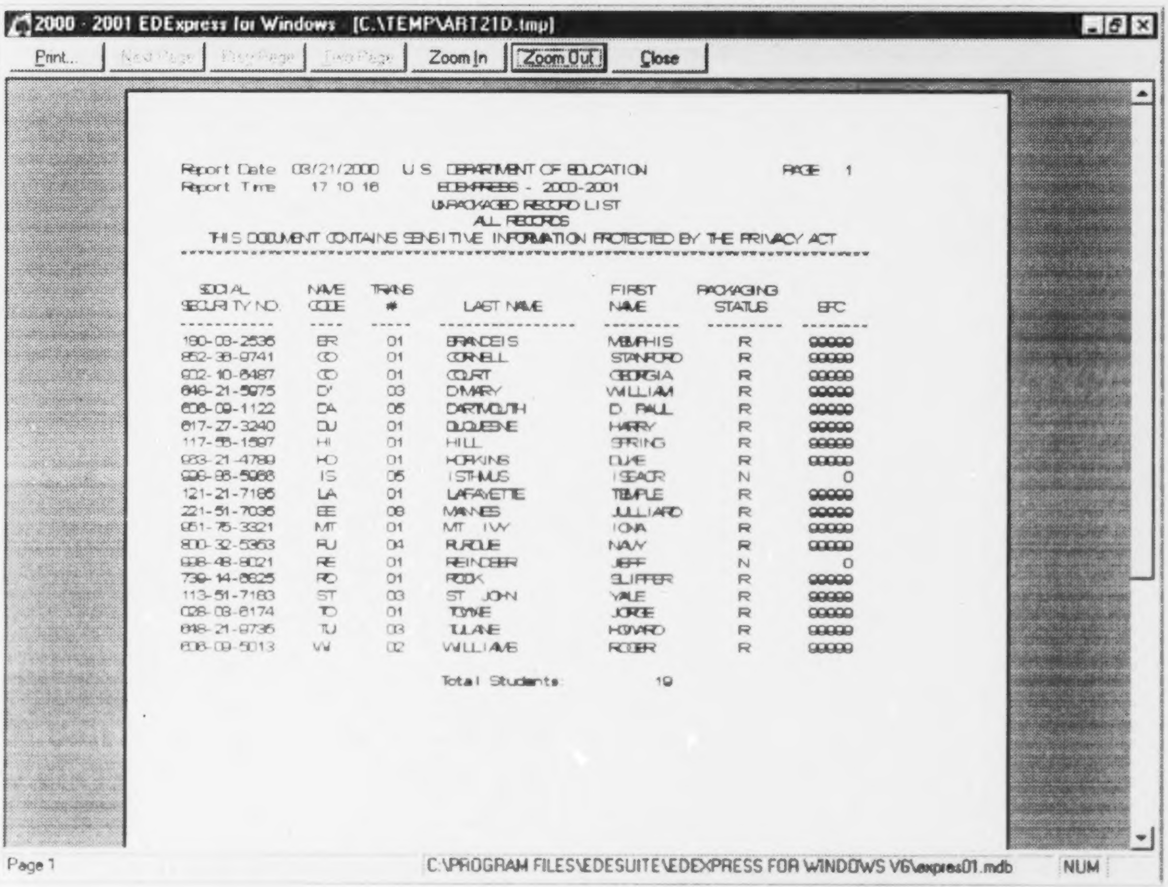
Printing the List-Unpackaged Students Report

This report is printed using the same method as other packaging reports.

It displays Social Security #, Name ID, Transaction Number, Packaging Status, and EFC for each student. Summary at end of the report provides the total number of students.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Zoom Out
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Page 1
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NUM

```
Report Date  03/21/2000   U S  DEPARTMENT OF EDUCATION                PAGE   1
Report Time    17 10 16          EDEXPRESS - 2000-2001
                                UNPACKAGED RECORD LIST
                                     ALL RECORDS
     THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
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   SOCIAL       NAME   TRANS                         FIRST     PACKAGING
 SECURITY NO.   CODE     #      LAST NAME            NAME       STATUS      EFC
 -----------    ----   -----  ----------------     ---------   ---------  --------
 190-03-2536     BR     01     BRANDEIS             MEMPHIS        R       99999
 852-38-9741     CO     01     CORNELL              STANFORD       R       99999
 802-10-8487     CO     01     COURT                GEORGIA        R       99999
 848-21-5975     D'     03     D'MARY               WILLIAM        R       99999
 608-09-1122     DA     05     DARTMOUTH            D  PAUL        R       99999
 617-27-3240     DU     01     DUQUESNE             HARRY          R       99999
 117-58-1597     HI     01     HILL                 SPRING         R       99999
 983-21-4789     HO     01     HOPKINS              DUKE           R       99999
 998-88-5988     IS     05     ISTHMUS              ISEACR         N           0
 121-21-7186     LA     01     LAFAYETTE            TEMPLE         R       99999
 221-51-7036     EE     08     MANNES               JULLIARD       R       99999
 951-75-3321     MT     01     MT  IVY              IONA           R       99999
 800-32-5363     PU     04     PURDUE               NAVY           R       99999
 998-48-8021     RE     01     REINDEER             JEFF           N           0
 739-14-8825     RO     01     ROCK                 SLIPPER        R       99999
 113-51-7183     ST     03     ST  JOHN             YALE           R       99999
 028-03-8174     TO     01     TOWNE                JORGE          R       99999
 848-21-8736     TU     03     TULANE               HOWARD         R       99999
 608-09-5013     WI     02     WILLIAMS             ROGER          R       99999

                               Total Students:          19
```

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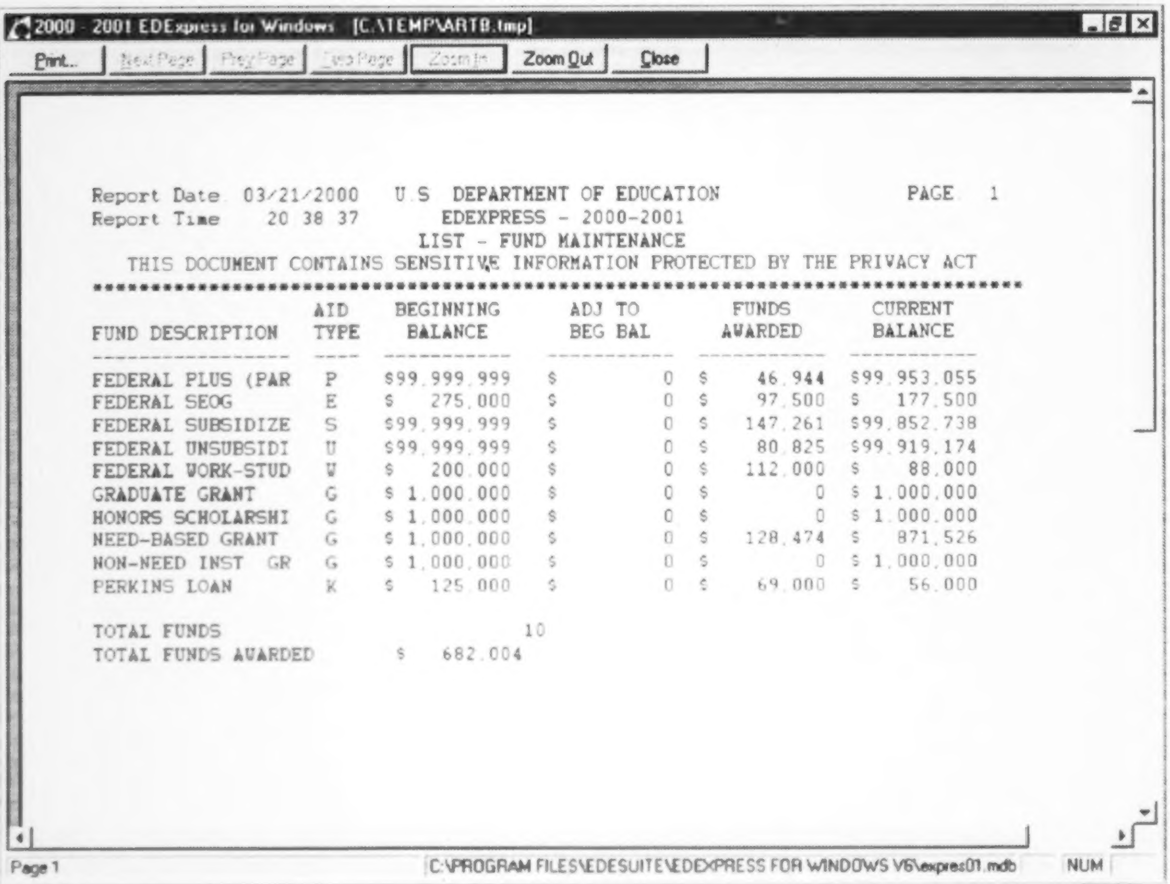
Printing the List-Fund Maintenance Report

This report is printed using the same method as other packaging reports.

It lists the Fund Description, Aid, Type, Beginning Balance, Adjustments to Beginning Balance, Funds Awarded and Current Balance for each fund in the Fund Maintenance setup. A summary at the end of the report provides the number of funds and total awarded.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Page 1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

```
Report Date  03/21/2000   U.S  DEPARTMENT OF EDUCATION               PAGE  1
Report Time     20 38 37        EDEXPRESS - 2000-2001
                               LIST - FUND MAINTENANCE
   THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
*****************************************************************************
                   AID   BEGINNING       ADJ TO         FUNDS        CURRENT
FUND DESCRIPTION   TYPE   BALANCE        BEG BAL       AWARDED       BALANCE
------------------ ----  -----------   -----------   -----------   -----------
FEDERAL PLUS (PAR   P    $99.999.999   $         0   $    46.944   $99.953.055
FEDERAL SEOG        E    $   275,000   $         0   $    97,500   $   177,500
FEDERAL SUBSIDIZE   S    $99,999,999   $         0   $   147,261   $99,852,738
FEDERAL UNSUBSIDI   U    $99,999,999   $         0   $    80,825   $99,919,174
FEDERAL WORK-STUD   W    $   200,000   $         0   $   112,000   $    88,000
GRADUATE GRANT      G    $ 1,000,000   $         0   $         0   $ 1,000,000
HONORS SCHOLARSHI   G    $ 1,000,000   $         0   $         0   $ 1,000,000
NEED-BASED GRANT    G    $ 1,000,000   $         0   $   128,474   $   871,526
NON-NEED INST  GR   G    $ 1,000,000   $         0   $         0   $ 1,000,000
PERKINS LOAN        K    $   125,000   $         0   $    69,000   $    56,000

TOTAL FUNDS                              10
TOTAL FUNDS AWARDED        $    682,004
```

Printing the Packaging Record Report

Prints on two pages per record

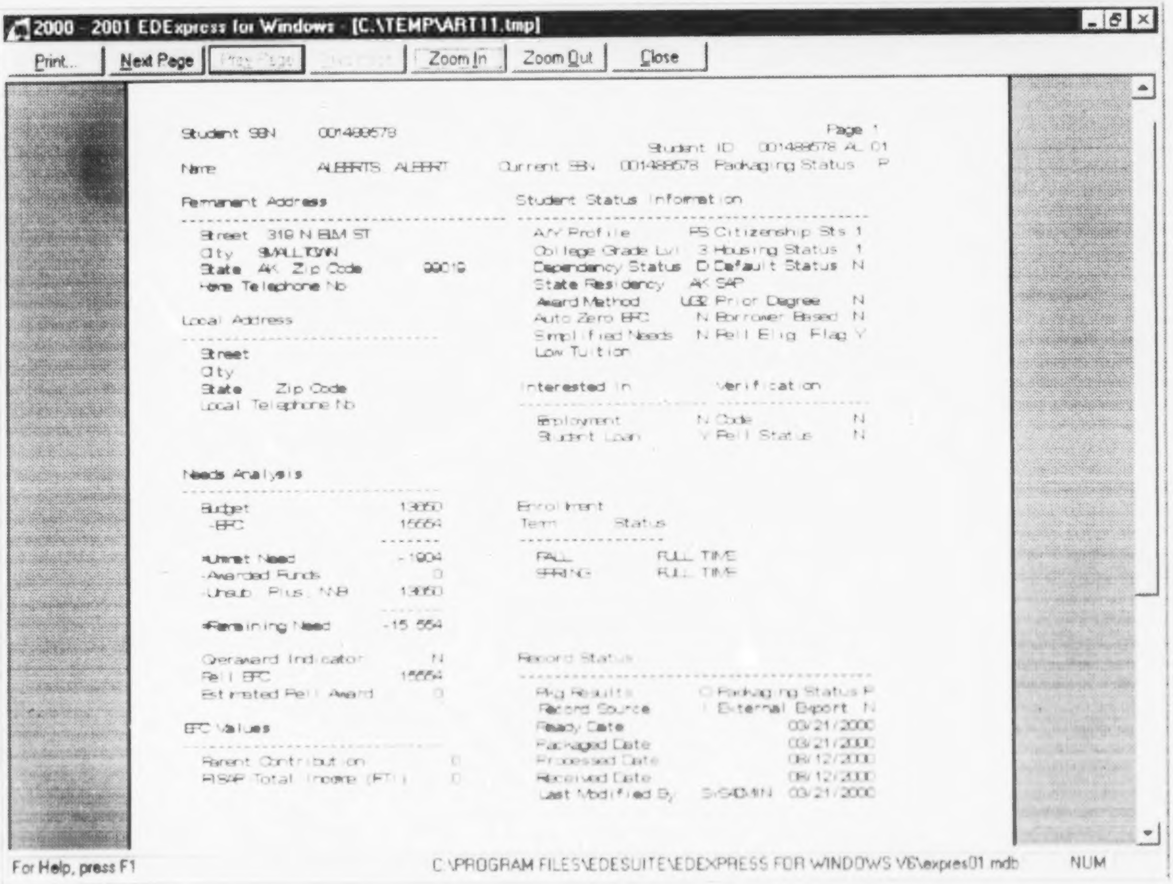
First page contains

- *Demographic info*
- *Needs Analysis*
- *EFC Values*
- *Student Status information*
- *Enrollment*
- *Record Status*

Packaging Records are printed using the same method as other packaging reports.

You have the option to print single or multiple records.

- If you choose single, enter a SSN or select one from the database.
- If you choose multiple, enter a SSN filename or specify selection criteria by entering a query title. When generating a report having multiple records, you have the option to sort the records by last name or SSN.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Zoom In
Zoom Out
Close
For Help, press F1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

```
Student SSN     001488578                                                 Page 1
                                                   Student ID   001488578 AL 01
Name            ALBERTS, ALBERT    Current SSN  001488578  Packaging Status   P

Permanent Address                          Student Status Information
-----------------------------------------  ---------------------------------------
  Street   319 N ELM ST                      A/Y Profile          FS Citizenship Sts 1
  City     SMALLTOWN                         College Grade Lvl     3 Housing Status  1
  State  AK  Zip Code        99019           Dependency Status     D Default Status  N
  Home Telephone No                          State Residency      AK SAP
                                             Award Method        UG2 Prior Degree    N
Local Address                                Auto Zero EFC         N Borrower Based  N
-------------------------------              Simplified Needs      N Pell Elig Flag  Y
  Street                                     Low Tuition
  City
  State     Zip Code                       Interested In         Verification
  Local Telephone No                       ---------------------------------------
                                             Employment            N Code            N
                                             Student Loan          Y Pell Status     N

Needs Analysis
-------------------------------
  Budget                    13650          Enrollment
  -EFC                      15554          Term         Status
                          -------          ------------------
  =Unmet Need               -1904            FALL         FULL TIME
  -Awarded Funds                0            SPRING       FULL TIME
  -Unsub, Plus, NNB         13650
                          -------
  =Remaining Need         -15,554

  Overaward Indicator           N          Record Status
  Pell EFC                  15554          ---------------------------------------
  Estimated Pell Award          0            Pkg Results          0 Packaging Status P
                                             Record Source        I External Export  N
EFC Values                                   Ready Date                  03/21/2000
-------------------------------              Packaged Date               03/21/2000
  Parent Contribution             0          Processed Date              08/12/2000
  FISAP Total Income (FTI)        0          Received Date               08/12/2000
                                             Last Modified By     SYSADMIN  03/21/2000
```

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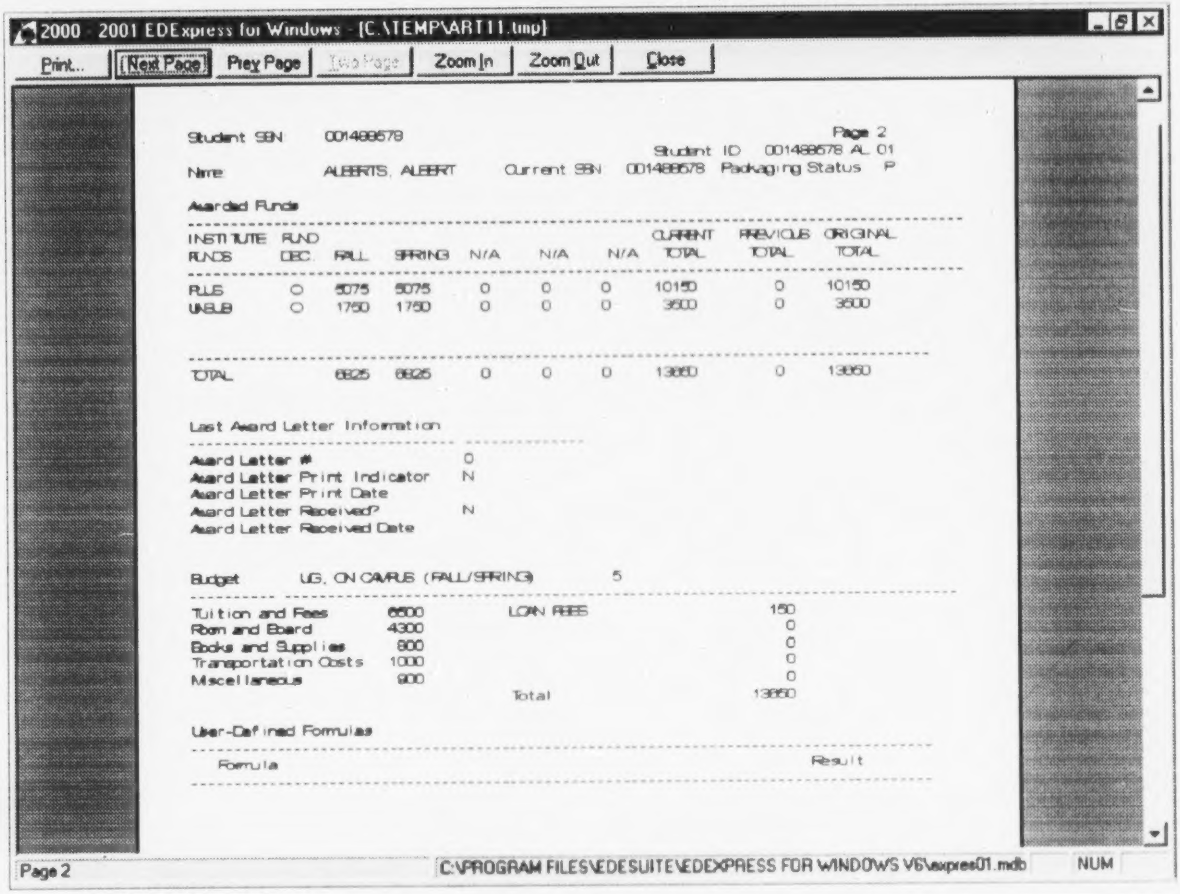
The second page of each record contains

- *Awarded funds*
- *Last Letter Information*
- *Budget*
- *User Defined Formulas /Results*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Two Page
Zoom In
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Page 2
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expres01.mdb
NUM

```
Student SSN     001488578                                              Page 2
                                                  Student ID   001488578 AL 01
Name            ALBERTS, ALBERT    Current SSN   001488578 Packaging Status   P

Awarded Funds
------------------------------------------------------------------------------
INSTITUTE  FUND                                   CURRENT  PREVIOUS  ORIGINAL
FUNDS      DEC.  FALL  SPRING  N/A   N/A   N/A    TOTAL    TOTAL     TOTAL
------------------------------------------------------------------------------
PLUS       O     5075  5075    0     0     0      10150    0         10150
UNSUB      O     1750  1750    0     0     0      3500     0         3500

------------------------------------------------------------------------------
TOTAL            6825  6825    0     0     0      13650    0         13650

Last Award Letter Information
------------------------------------------
Award Letter #                    0
Award Letter Print Indicator      N
Award Letter Print Date
Award Letter Received?            N
Award Letter Received Date

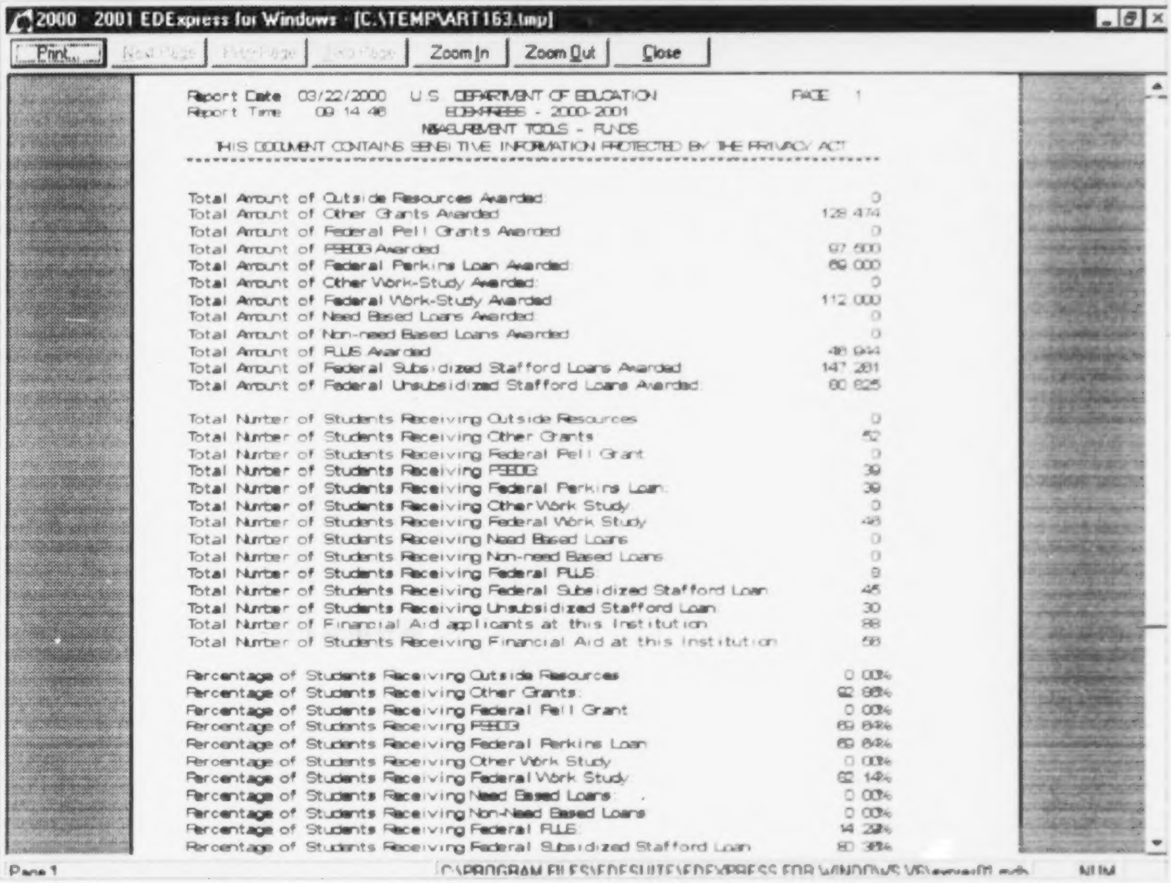
Budget      UG, ON CAMPUS (FALL/SPRING)       5
------------------------------------------------------------------------------
Tuition and Fees          6500     LOAN FEES                  150
Room and Board            4300                                  0
Books and Supplies         800                                  0
Transportation Costs      1000                                  0
Miscellaneous              900                                  0
                                   Total                    13650

User-Defined Formulas
------------------------------------------------------------------------------
   Formula                                                        Result
------------------------------------------------------------------------------
```

Printing the Measurement Tools: Funds Report

This report is printed using the same method as other packaging reports.

The report prints in three sections. The first section displays the total amount awarded for each fund. The second section displays the number of students receiving each fund. The third section displays the percentage of students receiving the fund.


2000 - 2001 EDExpress for Windows - [C:\TEMP\ART163.tmp]
Print...
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Last Page
Zoom In
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Page 1
C:\PROGRAM FILES\EDESUITE\EDEXPRESS FOR WINDOWS V6\expre...mdb
NUM

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Report Date  03/22/2000   U.S. DEPARTMENT OF EDUCATION              PAGE  1
Report Time    09:14:46         EDEXPRESS - 2000-2001
                             MEASUREMENT TOOLS - FUNDS
    THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
******************************************************************************

Total Amount of Outside Resources Awarded:                                  0
Total Amount of Other Grants Awarded:                                 128,474
Total Amount of Federal Pell Grants Awarded:                                0
Total Amount of FSEOG Awarded:                                         97,500
Total Amount of Federal Perkins Loan Awarded:                          69,000
Total Amount of Other Work-Study Awarded:                                   0
Total Amount of Federal Work-Study Awarded:                           112,000
Total Amount of Need Based Loans Awarded:                                   0
Total Amount of Non-need Based Loans Awarded:                               0
Total Amount of PLUS Awarded:                                          48,944
Total Amount of Federal Subsidized Stafford Loans Awarded:            147,281
Total Amount of Federal Unsubsidized Stafford Loans Awarded:           80,825

Total Number of Students Receiving Outside Resources:                       0
Total Number of Students Receiving Other Grants:                           52
Total Number of Students Receiving Federal Pell Grant:                      0
Total Number of Students Receiving FSEOG:                                  39
Total Number of Students Receiving Federal Perkins Loan:                   39
Total Number of Students Receiving Other Work Study:                        0
Total Number of Students Receiving Federal Work Study:                     46
Total Number of Students Receiving Need Based Loans:                        0
Total Number of Students Receiving Non-need Based Loans:                    0
Total Number of Students Receiving Federal PLUS:                            8
Total Number of Students Receiving Federal Subsidized Stafford Loan:       45
Total Number of Students Receiving Unsubsidized Stafford Loan:             30
Total Number of Financial Aid applicants at this Institution:              88
Total Number of Students Receiving Financial Aid at this Institution:      56

Percentage of Students Receiving Outside Resources:                     0.00%
Percentage of Students Receiving Other Grants:                         92.86%
Percentage of Students Receiving Federal Pell Grant:                    0.00%
Percentage of Students Receiving FSEOG:                                69.64%
Percentage of Students Receiving Federal Perkins Loan:                 69.64%
Percentage of Students Receiving Other Work Study:                      0.00%
Percentage of Students Receiving Federal Work Study:                   82.14%
Percentage of Students Receiving Need Based Loans:                      0.00%
Percentage of Students Receiving Non-Need Based Loans:                  0.00%
Percentage of Students Receiving Federal PLUS:                         14.29%
Percentage of Students Receiving Federal Subsidized Stafford Loan:     80.36%
```

Apply What You Learned

Complete the following exercise to see how much you remember about printing EDExpress system-defined reports.

In the blank before each system-defined report, write the letter of the corresponding EDExpress database in which the report would be generated/printed. G = Global, P = Packaging

_____ 1 Packaged Students by Fund Code
_____ 2 Record Layout-Import External Add
_____ 3 Document Tracking by Students
_____ 4 User-Defined Queries
_____ 5 User Data
_____ 6 Document Tracking by Document Code
_____ 7 User Letters
_____ 8 Entered Packaging Records
_____ 9 FISAP-Eligible Dependent Students
_____ 10 Award Letters

On the line below each report description, identify the name of the report.

1 This report provides a listing of all students in the Packaging database without regard to their packaging status.

____

2 This listing includes any student whose packaging status is not equal to P (Packaged), H (Hand Packaged), or M (Manually Packaged) to help you determine those students who still need to be packaged.

____

3 This report provides real-time information about total amounts awarded from each fund.

____

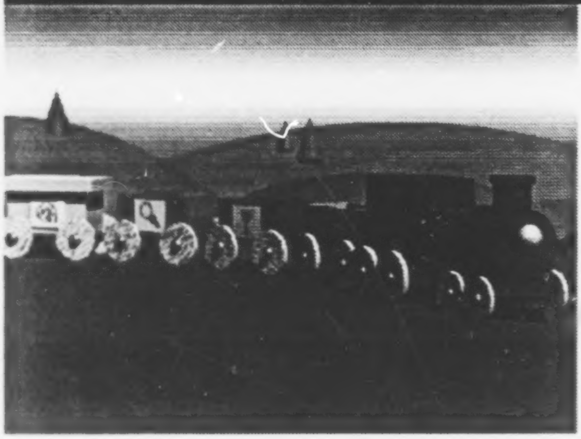
4 This report lists the totals awarded by aid type along with the number and percentage of students who receive funds from each aid type.

____

5 This report includes a detailed listing, as well as the total number, of students assigned individual documents. For each student record, the report also lists the document received date.

____

Unit 7



Advanced Apply What You Learned

In this unit you have an opportunity to use live EDExpress software to apply what you learned about the various EDExpress functions. The following thirteen (13) exercises may be done individually or in small groups. Note that some of the exercises are Packaging Functions prerequisites for others that follow. Refer to Appendix E–Quick Reference if you need a reminder about how to do the various system setups. Finally, do not print any reports to the printer; only print to Screen.

List of Exercises

1. Global and Packaged System Setup 7-2
2. Academic Year Profiles 7-5
3. Budgets and Queries 7-8
4. Funds and Queries 7-15
5. Award Methodologies and Queries 7-26
6. Multiple Entry to Add Documents and Queries 7-33
7. Packaging Process and Queries 7-36
8. Printing Packaging Reports and Queries 7-36
9. Printing Other Letters and Queries 7-39
10. Printing and Analyzing the Measurement Tools - Funds Report 7-39
11. Hand Packaging Awards 7-39
12. Funds, Queries, and Multiple Entry to Add Awards 7-40
13. Printing Notification Award Letters and Queries 7-40

Exercise 1: Global and Packaging System Setups

Using your own school as your reference:

1. Complete the blank Global System Setup Worksheet provided on page 7-3 and transfer the information to the software.
2. Complete the blank Packaging System Setup Worksheet provided on page 7-4 and transfer the information to the software.

Global System Setup Worksheet

Allow notepad entries to be edited?	☐ Yes ☐ No
Default System to display?	☐ Global ☐ App Express ☐ Packaging ☐ ________________
Number of Days to reprint Document Tracking Letters?	
Number of Times to reprint Document Tracking Letters?	
Number of Copies of Document Tracking Letters to Print?	
Return to Dialog?	☐ Yes ☐ No
Print Default?	☐ Single Record ☐ Multiple Records
TG ID #	

Packaging System Setup Worksheet

Enter total number of award letters to be printed per student.	
Enter maximum number of award letters to be sent per student.	
Enter Award Letter Type	☐ O (Offer) ☐ N (Notification)
Allow Pell EFC to be modified?	☐ Yes ☐ No
Enter Packaging Results Default Status	☐ O (Offered) ☐ A (Accepted)
Enter Priority Date Deadline Type	☐ A (Received Date) ☐ P (Processed Date) ☐ R (Ready Date) ☐ U (User Defined Date)
User Defined Date Name (required for Priority Date Deadline Type U)	
Use Low Tuition?	☐ Yes ☐ No
Enter Default Housing Status	☐ 1 (On campus) ☐ 2 (Off campus) ☐ 3 (With parent)

Exercise 2: Academic Year Profiles

1. Using the worksheet on page 7-6, create an Academic Year Profile in the software.
2. Then, open each of the following student records and change their AYPs to TRIM:

    739-14-6825

    606-09-5013

    617-27-3240

   If a budget code is needed, assign Budget Code 5 for the time being.
3. Using your school as a reference, complete the Academic Year Profile Worksheet on page 7-7 to define the spring term and enter it into the software.

Academic Year Profile Worksheet

Define a code to identify the Academic Year Profile (up to 4 characters, can be alphanumeric).	T R I M	
Is this Academic Year Profile the default Academic Year?	Yes ☐	No ☒

Enter the Academic Year Profile Title (can be alphanumeric).

2000-2001 Trimester

Enter Pell Grant Formula

1. ☐	Standard Term 30 weeks. (Formula 1)
2. ☐	Standard Term less than 30 weeks. (Formula 2)
3. ☒	Any Term-based credit hour program. (Formula 3)
4. ☐	Clock Hour and Credit Hour without terms. (Formula 4)
5. ☐	Correspondence Study, non term-based program. (Formula 5)
6. ☐	Correspondence Study, term-based program. (Formula 6)

Enter Program Proration Percent for Pell Grant Formuls 2, 4, 5 ________% (00 to 99)

For calculating the EFC, what is the program length in months?

1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☒ 10 ☐ 11 ☐ 12 ☐

Term Breakdown

Percentage across terms cannot exceed 100%

Enter Pell percent for Pell Formulas 3, 4, 5, 6

Term Name (Free Form)	Default Enrollment Status (F, ¾, ½, < ½, Fall 2000, Winter 2000, etc.)	Pell %	SEOG %	Grant %	Perkins %	WS %	Subsidized Loan %	Other Loan %
Term 1	Full time	33.33	33.33	33.33	33.33	33.33	33.33	33.33
Term 2	Full time	33.33	33.33	33.33	33.33	33.33	33.33	33.33
Term 3	Full time	33.33	33.33	33.33	33.33	33.33	33.33	33.33

Academic Year Profile Worksheet

Define a code to identify the Academic Year Profile (up to 4 characters, can be alphanumeric).	__ __ __ __	
Is this Academic Year Profile the default Academic Year?	Yes ☐	No ☐
Enter the Academic Year Profile Title (can be alphanumeric).		

Enter Pell Grant Formula

1. ☐	Standard Term 30 weeks. (Formula 1)
2. ☐	Standard Term less than 30 weeks. (Formula 2)
3. ☐	Any Term-based credit hour program. (Formula 3)
4. ☐	Clock Hour and Credit Hour without terms. (Formula 4)
5. ☐	Correspondence Study, non term-based program. (Formula 5)
6. ☐	Correspondence Study, term-based program. (Formula 6)

Enter Program Proration Percent for Pell Grant Formuls 2, 4, 5 ________% (00 to 99)

For calculating the EFC, what is the program length in months?

1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10 ☐ 11 ☐ 12 ☐

Term Breakdown

Percentage across terms cannot exceed 100%

Enter Pell percent for Pell Formulas 3, 4, 5, 6

Term Name (Free Form)	Default Enrollment Status (F,¾,½,< ½, Fall 2000, Winter 2000, etc.)	Pell %	SEOG %	Grant %	Perkins %	WS %	Subsidized Loan %	Other Loan %

Exercise 3: Budgets and Queries

1. Referring to the following worksheets, create Budgets in the software. Before doing so, you must create the corresponding queries.

- 1st yr, UG on campus = first-time freshmen undergraduates residing on campus
- 1st yr, UG off campus = first-time freshmen undergraduates not residing on campus
- UG off campus = all undergraduates, other than first-time freshmen, not residing on campus

2. Once you have created additional budgets, open the following student records, review the data on the Award screen, and modify each budget code as needed.

   739-14-6825

   606-09-5013

   617-27-3240

   998-20-1810

   Identify any records for which the budget would need to be adjusted based on projected enrollment.

3. You still need to add budgets for the rest of the records in the Packaging database. First, check your Packaging System Setup and verify that the Default Housing Status is set to 1. Then, use the Process/Add Budgets function with no selection criteria. (Remember: Records will be assigned to budgets based on the Selection Criteria specified when the budgets were set up in the software.)

Query Worksheet

What Task do You Want to Perform?	What Module is Available to Create the Query to Perform this Task?
Assign student records to budget	☐ Apps ☐ Global ☐ DL ☒ Packaging ☐ Pell

Enter a title for the Query that describes the group of students to be selected:
1st Yr, UG, on campus

Data Element	Operators	Value
Enter the data field(s) from the Module indicated above	=, <>, <, >, >=, <=, like, not like	☐ Prompt at Execution (to create a parameter query) ☒ Enter free-form or system-assigned value

☐ Left (☐ Right)

College Grade Level	=	1

☒ And ☐ Or ☐ Left (☐ Right)

Housing Code	=	1

☐ And ☐ Or ☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

Cost of Attendance Budget Worksheet

1. Enter the Budget Code (Up to four alphanumeric characters).	3 ___ ___ ___
2. Establish a priority number (0-999). If a student is selected for more than one budget, the highest priority budget is applied	3 ___ ___

3. Enter up to fifty (50) characters to create a free-form title.

1st Yr, UG, on campus (Fall/Spring)

4. Select a Query that is used to select the group of students who should receive this budget (optional).

1st Yr, UG, on campus

Budget Component	Budget Amount	User Defined Budget Component	Budget Amount
Tuition & Fees	6,500	Loan Fees	80
Room & Board	4,300	Computer Expenses	1,500
Books & Supplies	800		
Transportation	1,000		
Miscellaneous	900		

Total	15,080

Query Worksheet

What Task do You Want to Perform?	What Module is Available to Create the Query to Perform this Task?
Assign student records to budget	☐ Apps ☐ Global ☐ DL ☒ Packaging ☐ Pell

Enter a title for the Query that describes the group of students to be selected:
1st Yr, UG, off campus

Data Element	Operators	Value
Enter the data field(s) from the Module indicated above	=, <>, <, >, >=, <=, like, not like	☐ Prompt at Execution (to create a parameter query) ☒ Enter free-form or system-assigned value
	☐ Left (☐ Right)	
College Grade Level	=	1
☒ And ☐ Or	☐ Left (☐ Right)	
Housing Code	>	1
☐ And ☐ Or	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	

Cost of Attendance Budget Worksheet

1. Enter the Budget Code (Up to four alphanumeric characters).	**4** ___ ___ ___
2. Establish a priority number (0-999). If a student is selected for more than one budget, the highest priority budget is applied	**4** ___ ___

3. Enter up to fifty (50) characters to create a free-form title.

1st Yr, UG, off campus (Fall/Spring)

4. Select a Query that is used to select the group of students who should receive this budget (optional).

1st Yr, UG, off campus

Budget Component	Budget Amount	User Defined Budget Component	Budget Amount
Tuition & Fees	6,500	Loan Fees	80
Room & Board	2,000	Computer Expenses	1,500
Books & Supplies	800		
Transportation	1,500		
Miscellaneous	900		

Total	13,280

Query Worksheet

What Task do You Want to Perform?	What Module is Available to Create the Query to Perform this Task?
Assign student records to budget	☐ Apps ☐ Global ☐ DL ☒ Packaging ☐ Pell

Enter a title for the Query that describes the group of students to be selected:
UG, off campus

Data Element	Operators	Value
Enter the data field(s) from the Module indicated above	=, <>, <, >, >=, <=, like, not like	☐ Prompt at Execution (to create a parameter query) ☒ Enter free-form or system-assigned value

☐ Left (☐ Right)

Housing Code	**>**	**1**

☒ And ☐ Or ☒ Left (☐ Right)

College Grade Level	**>=**	**2**

☒ And ☐ Or ☐ Left (☒ Right)

College Grade Level	**<=**	**6**

☐ And ☐ Or ☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

Cost of Attendance Budget Worksheet

1. Enter the Budget Code (Up to four alphanumeric characters).	**6**
2. Establish a priority number (0-999). If a student is selected for more than one budget, the highest priority budget is applied	**6**

3. Enter up to fifty (50) characters to create a free-form title.

UG, off campus (Fall/Spring)

4. Select a Query that is used to select the group of students who should receive this budget (optional).

UG, off campus

Budget Component	Budget Amount	User Defined Budget Component	Budget Amount
Tuition & Fees	**6,500**	**Loan Fees**	**150**
Room & Board	**2,000**		
Books & Supplies	**800**		
Transportation	**1,500**		
Miscellaneous	**1,000**		

Total	**11,950**

Exercise 4: Funds and Queries

Referring to the following worksheets:

1. Create Funds in the software.
2. Before doing so, create queries in the software to select specific student populations to receive FSEOG, FWS, and Perkins funds.

Query Worksheet

What Task do You Want to Perform?	What Module is Available to Create the Query to Perform this Task?
	☐ Apps ☐ Global ☐ DL ☐ Packaging ☐ Pell

Enter a title for the Query that describes the group of students to be selected:

Data Element	Operators	Value
Enter the data field(s) from the Module indicated above	=, <>, <, >, >=, <=, like, not like	☐ Prompt at Execution (to create a parameter query) ☐ Enter free-form or system-assigned value

☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

Fund Maintenance Worksheet

1. Enter up to eight characters to create a free-form **Fund Code**.	FSEOG
2. Enter up to 25 characters to create a free-form **Fund Description**.	Federal SEOG
3. Select an **Aid Type** from below.	E

E = FSEOG	**L = Other Need-Based Loan**	**S = Subsidized Stafford**
F = Pell	**N = Non Need-Based Loan**	**U = Unsubsidized Stafford**
G = Any grant or scholarship	**O = Outside Resources**	**W = Federal Work-Study**
K = Perkins	**P = PLUS**	**Y = Other Work-Study**

4. Enter the **Beginning Fund Balance**.	$ 275,000

Awards are automatically subtracted from the Beginning Balance. Current (balance) plus Awarded (balance) should equal Beginning Balance (if Adjustments are 0).

5. Enter an **Adjustment** to increase or decrease the Beginning Balance after the initial awarding of the fund.	$

6. Enter parameters to award this fund based on **Remaining Need** (optional). Does not apply to Fund Types F, O, P, S, U.

#	Minimum Need	Maximum Need	Amount to Award
1	100	3500	1000
2	3501	99999	2000
3			
4			
5			
6			

7. Select the **Packaging Criteria** (optional). Queries match student records with criteria you specify for awarding the fund. For example, Work-Study awards can be limited to students who answered "Yes" on the FAFSA question about the student's interest in Work Study aid. This selection criteria works in addition to the Award Methodology.	

✎ *Note: Beginning balance for SEOG would be tied to your school's authorization for campus-based funds.*

Query Worksheet

What Task do You Want to Perform?	What Module is Available to Create the Query to Perform this Task?
	☐ Apps ☐ Global ☐ DL ☐ Packaging ☐ Pell

Enter a title for the Query that describes the group of students to be selected:

Data Element	Operators	Value
Enter the data field(s) from the Module indicated above	=, <>, <, >, >=, <=, like, not like	☐ Prompt at Execution (to create a parameter query) ☐ Enter free-form or system-assigned value

☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

Unit 7—Advanced Apply What You Learned

Fund Maintenance Worksheet

1. Enter up to eight characters to create a free-form **Fund Code**.	FWS
2. Enter up to 25 characters to create a free-form **Fund Description**.	Federal Work-Study
3. Select an **Aid Type** from below.	W

E = FSEOG	**L = Other Need-Based Loan**	**S = Subsidized Stafford**
F = Pell	**N = Non Need-Based Loan**	**U = Unsubsidized Stafford**
G = Any grant or scholarship	**O = Outside Resources**	**W = Federal Work-Study**
K = Perkins	**P = PLUS**	**Y = Other Work-Study**

4. Enter the **Beginning Fund Balance**.	$ 200,000

Awards are automatically subtracted from the Beginning Balance. Current (balance) plus Awarded (balance) should equal Beginning Balance (if Adjustments are 0).

5. Enter an **Adjustment** to increase or decrease the Beginning Balance after the initial awarding of the fund.	$

6. Enter parameters to award this fund based on **Remaining Need** (optional). Does not apply to Fund Types F, O, P, S, U.

#	Minimum Need	Maximum Need	Amount to Award
1			
2			
3			
4			
5			
6			

7. Select the **Packaging Criteria** (optional). Queries match student records with criteria you specify for awarding the fund. For example, Work-Study awards can be limited to students who answered "Yes" on the FAFSA question about the student's interest in Work Study aid. This selection criteria works in addition to the Award Methodology.	

✎ *Note: Beginning balance for FWS would be tied to your school's authorization for campus-based funds.*

Query Worksheet

What Task do You Want to Perform?	What Module is Available to Create the Query to Perform this Task?
	☐ Apps ☐ Global ☐ DL ☐ Packaging ☐ Pell

Enter a title for the Query that describes the group of students to be selected:

Data Element	Operators	Value
Enter the data field(s) from the Module indicated above	=, <>, <, >, >=, <=, like, not like	☐ Prompt at Execution (to create a parameter query) ☐ Enter free-form or system-assigned value

☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

Fund Maintenance Worksheet

1. Enter up to eight characters to create a free-form **Fund Code**.	Perkins
2. Enter up to 25 characters to create a free-form **Fund Description**.	Perkins Loan
3. Select an **Aid Type** from below.	K

E = FSEOG	**L = Other Need-Based Loan**	**S = Subsidized Stafford**
F = Pell	**N = Non Need-Based Loan**	**U = Unsubsidized Stafford**
G = Any grant or scholarship	**O = Outside Resources**	**W = Federal Work-Study**
K = Perkins	**P = PLUS**	**Y = Other Work-Study**

4. Enter the **Beginning Fund Balance**.	$ 125,000

Awards are automatically subtracted from the Beginning Balance. Current (balance) plus Awarded (balance) should equal Beginning Balance (if Adjustments are 0).

5. Enter an **Adjustment** to increase or decrease the Beginning Balance after the initial awarding of the fund.	$

6. Enter parameters to award this fund based on **Remaining Need** (optional). Does not apply to Fund Types F, O, P, S, U.

#	Minimum Need	Maximum Need	Amount to Award
1	5000	8000	1000
2	8001	99999	2000
3			
4			
5			
6			

7. Select the **Packaging Criteria** (optional). Queries match student records with criteria you specify for awarding the fund. For example, Work-Study awards can be limited to students who answered "Yes" on the FAFSA question about the student's interest in Work Study aid. This selection criteria works in addition to the Award Methodology.	

✎ *Note: Beginning balance for Perkins Loan would be tied to your school's authorization for campus-based funds.*

Unit 7—Advanced Apply What You Learned

Fund Maintenance Worksheet

1. Enter up to eight characters to create a free-form **Fund Code**.	Need
2. Enter up to 25 characters to create a free-form **Fund Description**.	Need-Based Grant
3. Select an **Aid Type** from below.	G

E = FSEOG	**L = Other Need-Based Loan**	**S = Subsidized Stafford**
F = Pell	**N = Non Need-Based Loan**	**U = Unsubsidized Stafford**
G = Any grant or scholarship	**O = Outside Resources**	**W = Federal Work-Study**
K = Perkins	**P = PLUS**	**Y = Other Work-Study**

4. Enter the **Beginning Fund Balance**.	$ 1,000,000

Awards are automatically subtracted from the Beginning Balance. Current (balance) plus Awarded (balance) should equal Beginning Balance (if Adjustments are 0).

5. Enter an **Adjustment** to increase or decrease the Beginning Balance after the initial awarding of the fund.	$

6. Enter parameters to award this fund based on **Remaining Need** (optional). Does not apply to Fund Types F, O, P, S, U.

#	Minimum Need	Maximum Need	Amount to Award
1	2500	4000	1500
2	4001	99999	2500
3			
4			
5			
6			

7. Select the **Packaging Criteria** (optional). Queries match student records with criteria you specify for awarding the fund. For example, Work-Study awards can be limited to students who answered "Yes" on the FAFSA question about the student's interest in Work Study aid. This selection criteria works in addition to the Award Methodology.	

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Fund Maintenance Worksheet

1. Enter up to eight characters to create a free-form **Fund Code**.	Sub
2. Enter up to 25 characters to create a free-form **Fund Description**.	Federal Subsidized Loan
3. Select an **Aid Type** from below.	S

E = FSEOG	**L = Other Need-Based Loan**	**S = Subsidized Stafford**
F = Pell	**N = Non Need-Based Loan**	**U = Unsubsidized Stafford**
G = Any grant or scholarship	**O = Outside Resources**	**W = Federal Work-Study**
K = Perkins	**P = PLUS**	**Y = Other Work-Study**

4. Enter the **Beginning Fund Balance**.	$ **99,999,999** (System default)

Awards are automatically subtracted from the Beginning Balance. Current (balance) plus Awarded (balance) should equal Beginning Balance (if Adjustments are 0).

5. Enter an **Adjustment** to increase or decrease the Beginning Balance after the initial awarding of the fund.	$

6. Enter parameters to award this fund based on **Remaining Need** (optional). Does not apply to Fund Types F, O, P, S, U.

#	Minimum Need	Maximum Need	Amount to Award
1			
2			
3			
4			
5			
6			

7. Select the **Packaging Criteria** (optional). Queries match student records with criteria you specify for awarding the fund. For example, Work-Study awards can be limited to students who answered "Yes" on the FAFSA question about the student's interest in Work Study aid. This selection criteria works in addition to the Award Methodology.	

Fund Maintenance Worksheet

1. Enter up to eight characters to create a free-form **Fund Code**.	Unsub
2. Enter up to 25 characters to create a free-form **Fund Description**.	Federal Unsubsidized Loan
3. Select an **Aid Type** from below.	U

E = FSEOG	**L = Other Need-Based Loan**	**S = Subsidized Stafford**
F = Pell	**N = Non Need-Based Loan**	**U = Unsubsidized Stafford**
G = Any grant or scholarship	**O = Outside Resources**	**W = Federal Work-Study**
K = Perkins	**P = PLUS**	**Y = Other Work-Study**

4. Enter the **Beginning Fund Balance**.	$ 99,999,999 (System default)

Awards are automatically subtracted from the Beginning Balance. Current (balance) plus Awarded (balance) should equal Beginning Balance (if Adjustments are 0).

5. Enter an **Adjustment** to increase or decrease the Beginning Balance after the initial awarding of the fund.	$

6. Enter parameters to award this fund based on **Remaining Need** (optional). Does not apply to Fund Types F, O, P, S, U.

#	Minimum Need	Maximum Need	Amount to Award
1			
2			
3			
4			
5			
6			

7. Select the **Packaging Criteria** (optional). Queries match student records with criteria you specify for awarding the fund. For example, Work-Study awards can be limited to students who answered "Yes" on the FAFSA question about the student's interest in Work Study aid. This selection criteria works in addition to the Award Methodology.	

Fund Maintenance Worksheet

1. Enter up to eight characters to create a free-form **Fund Code**. PLUS

2. Enter up to 25 characters to create a free-form **Fund Description**. Federal Parent/PLUS Loan

3. Select an **Aid Type** from below. P

E = FSEOG
F = Pell
G = Any grant or scholarship
K = Perkins
L = Other Need-Based Loan
N = Non Need-Based Loan
O = Outside Resources
P = PLUS
S = Subsidized Stafford
U = Unsubsidized Stafford
W = Federal Work-Study
Y = Other Work-Study

4. Enter the **Beginning Fund Balance**. $ **99,999,999** (System default)

Awards are automatically subtracted from the Beginning Balance. Current (balance) plus Awarded (balance) should equal Beginning Balance (if Adjustments are 0).

5. Enter an **Adjustment** to increase or decrease the Beginning Balance after the initial awarding of the fund. $

6. Enter parameters to award this fund based on **Remaining Need** (optional). Does not apply to Fund Types F, O, P, S, U.

#	Minimum Need	Maximum Need	Amount to Award
1			
2			
3			
4			
5			
6			

7. Select the **Packaging Criteria** (optional). Queries match student records with criteria you specify for awarding the fund. For example, Work-Study awards can be limited to students who answered "Yes" on the FAFSA question about the student's interest in Work Study aid. This selection criteria works in addition to the Award Methodology.

Exercise 5: Methodologies and Queries (Prerequisite: Exercise 4)

For each of the following worksheets:

1. Create Award Methodologies in the software.
2. Before doing so, you must create the corresponding queries.

Query Worksheet

What Task do You Want to Perform?	What Module is Available to Create the Query to Perform this Task?
Assign Packaging Records to Award Methodology	☐ Apps ☐ Global ☐ DL ☒ Packaging ☐ Pell

Enter a title for the Query that describes the group of students to be selected:

Undergraduates EFC < 3101

Data Element	Operators	Value
Enter the data field(s) from the Module indicated above	=, <>, <, >, >=, <=, like, not like	☐ Prompt at Execution (to create a parameter query) ☒ Enter free-form or system-assigned value

☐ Left (☐ Right)

EFC	<	**3101**

☒ And ☐ Or ☒ Left (☐ Right)

College Grade Level	>=	**1**

☒ And ☐ Or ☐ Left (☒ Right)

College Grade Level	<=	**6**

☐ And ☐ Or ☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

Unit 7—Advanced Apply What You Learned

Award Methodology Worksheet

1. Establish up to a 4-character code to identify the award methodology		UG1
2. Enter up to 50 characters to create a free-form description of the award methodology. Undergraduates EFC < 3101		
3. Establish a 3-character priority number for this award methodology. If a student is selected for more than one methodology, the highest priority methodology is applied.		1
4. For Aid Maximums use:	☑ Percentages	☐ Dollar Amounts
5. The maximum percentage or dollar amount of the total award package that is awarded as self-help aid, either work-study or loans.		100%
6. The maximum percentage or dollar amount of the total award package that can be awarded as gift aid.		100%
7. Select a Query that is used to select the group of students for this funding package (optional). Undergraduates EFC < 3101		

8. Establish award parameters for up to 20 specific funds (Pell Grant is hard coded and therefore not entered on this table).

Identify fund to award	Identify priority of award	Identify minimum award	Identify maximum award	Identify minimum EFC to make award	Identify maximum EFC to make award	Refer to supplemental worksheet*
Fund Code	**Priority**	**Minimum $**	**Maximum $**	**Minimum EFC**	**Maximum EFC**	**Remaining Need**
FSEOG	1	1000	2500	0	500	*
FWS	2	1000	2500	0	13500	
Perkins	3	1000	2000	0	13500	*
Need	4	500	3500	0	13500	*
Sub	5	200	99999	0	99999	
Unsub	6	200	99999	0	99999	
PLUS	7	200	99999	0	99999	

*Award Methodology Remaining Need Worksheet

Fund Code: **FSEOG**

#	Minimum Need	Maximum Need	Amount to Award
1	2000	3500	1000
2	3501	99999	2500
3			
4			
5			
6			

Fund Code: **Perkins**

#	Minimum Need	Maximum Need	Amount to Award
1	5000	8000	1000
2	8001	99999	2000
3			
4			
5			
6			

Fund Code: **Need**

#	Minimum Need	Maximum Need	Amount to Award
1	2500	4000	1500
2	4001	99999	2500
3			
4			
5			
6			

Fund Code:

#	Minimum Need	Maximum Need	Amount to Award
1			
2			
3			
4			
5			
6			

Fund Code:

#	Minimum Need	Maximum Need	Amount to Award
1			
2			
3			
4			
5			
6			

Query Worksheet

What Task do You Want to Perform?	What Module is Available to Create the Query to Perform this Task?
Assign Packaging Records to Award Methodology	☐ Apps ☐ Global ☐ DL ☒ Packaging ☐ Pell

Enter a title for the Query that describes the group of students to be selected:
Undergraduates EFC > 3100

Data Element	Operators	Value
Enter the data field(s) from the Module indicated above	=, <>, <, >, >=, <=, like, not like	☐ Prompt at Execution (to create a parameter query) ☒ Enter free-form or system-assigned value

☐ Left (☐ Right)

EFC	**>**	**3100**

☒ And ☐ Or ☒ Left (☐ Right)

College Grade Level	**>=**	**1**

☒ And ☐ Or ☐ Left (☒ Right)

College Grade Level	**<=**	**6**

☐ And ☐ Or ☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

Award Methodology Worksheet

1. Establish up to a 4-character code to identify the award methodology **UG2**

2. Enter up to 50 characters to create a free-form description of the award methodology.

Undergraduates EFC > 3100

3. Establish a 3-character priority number for this award methodology. If a student is selected for more than one methodology, the highest priority methodology is applied. **2**

4. For Aid Maximums use: ☑ Percentages ☐ Dollar Amounts

5. The maximum percentage or dollar amount of the total award package that is awarded as self-help aid, either work-study or loans. **100%**

6. The maximum percentage or dollar amount of the total award package that can be awarded as gift aid. **80%**

7. Select a Query that is used to select the group of students for this funding package (optional).

Undergraduates EFC > 3100

8. Establish award parameters for up to 20 specific funds (Pell Grant is hard coded and therefore not entered on this table).

Identify fund to award	Identify priority of award	Identify minimum award	Identify maximum award	Identify minimum EFC to make award	Identify maximum EFC to make award	Refer to supplemental worksheet*
Fund Code	**Priority**	**Minimum $**	**Maximum $**	**Minimum EFC**	**Maximum EFC**	**Remaining Need**
FWS	1	1000	2500	0	13500	
Need	2	500	3500	0	13500	*
Sub	3	200	99999	0	99999	
Unsub	4	200	99999	0	99999	
PLUS	5	200	99999	0	99999	

*Award Methodology Remaining Need Worksheet

Fund Code: **Need**

#	Minimum Need	Maximum Need	Amount to Award
1	2500	4000	1500
2	4001	99999	2500
3			
4			
5			
6			

Fund Code:

#	Minimum Need	Maximum Need	Amount to Award
1			
2			
3			
4			
5			
6			

Fund Code:

#	Minimum Need	Maximum Need	Amount to Award
1			
2			
3			
4			
5			
6			

Fund Code:

#	Minimum Need	Maximum Need	Amount to Award
1			
2			
3			
4			
5			
6			

Fund Code:

#	Minimum Need	Maximum Need	Amount to Award
1			
2			
3			
4			
5			
6			

Exercise 6: Multiple Entry and Queries to Add Documents

1. Use the following worksheets to create both a parameter query and a document in the software.
2. Use the Multiple Entry, Global function to add the document INST APPL with a document status of N to students whose packaging records were created by external import. Use as Selection Criteria the parameter query RECORD SOURCE you just created and assign a parameter value not equal to I (ISIR Import).

Query Worksheet

What Task do You Want to Perform?	What Module is Available to Create the Query to Perform this Task?
Assign Documents Using Multiple Entry	☐ Apps ☒ Global ☐ DL ☐ Packaging ☐ Pell

Enter a title for the Query that describes the group of students to be selected:
Record Source

Data Element	Operators	Value
Enter the data field(s) from the Module indicated above	=, <>, <, >, >=, <=, like, not like	☒ Prompt at Execution (to create a parameter query) ☐ Enter free-form or system-assigned value
	☐ Left (☐ Right)	
Record Source	**<>**	**Prompt at execution**
☐ And ☐ Or	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	

Document Tracking Worksheet

1. **Document Code:** This code displays on reports and on the Document Tracking tab of the student's record (10-character alphanumeric).

Document Code: Inst Appl

2. **Year:** Enter the year(s), if applicable, that applies to the document begin requested. This prints on reports and on the Document Tracking tab of the student's record (9-character alphanumeric).

Year: 2000-2001

3. **Description:** Enter a free-form description of the document. The description prints on the Document Tracking letter as the item being requested (50-character alphanumeric).

Description: WTBCC Institutional Application

4. **Criteria:** Enter title of query that selects student records that the document tracking code is assigned.

Criteria:

5. **Automatic Request?** Do you want this document to be added automatically to student records when the Add Documents function is performed?

Automatic Request? Yes ☒ No ☐

6. **Required for Packaging?** Is this document required before your office packages financial aid for students to which the document is assigned?

Required for Packaging? Yes ☐ No ☒

7. **Required for Verification?** Is this document being requested of all students who have been selected for verification by CPS?

Required for Verification? Yes ☐ No ☒

8. **Comments:** This document should be assigned to those student records having one or more of the following ISIR comment codes:

☐ ☐ ☐ ☐ ☐ ☐

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Exercise 7: Packaging Process and Queries (Prerequisite Exercise 5)

1. Run the Packaging process to package the records previously created by the ISIR import.
   - Use as Selection Criteria the parameter query PACKAGING RECORD SOURCE and assign a parameter value of 1
   - Do not include the records packaged by hand option.
   - Do not print the Packaged Student List
2. Does this process include students who you awarded music scholarships? Why or why not? If so, what other action do you need to take?

Exercise 8: Print Packaging Reports and Queries

Using the same query (Packaging Record Source):

1. Print the List-Packaged Students to screen, sort by last name
   - Include students packaged with no funds
   - Scroll down and identify all students packaged without funds, since these student records may require modification or manual entry of awards
2. Print the List-Unpackaged Students to screen, sort by last name.
3. Open the packaging records for 998-86-5966 (Isaac Isthmus) and 998-49-1418 (Acup Sanka), two of the packaging records that are not packaged:
   - Complete a Packaging Record Review Worksheet for each
   - Determine if you have enough information to modify the records to make them ready to be packaged

Packaging Record Review Worksheet

Student Name:	
How was the Packaging record created?	
How do you know?	
Has the record been packaged?	Yes ☐ No ☐
How do you know?	
If the record has been packaged, how much aid was awarded?	
How do you know?	
If the record has not packaged, is it ready to be packaged?	Yes ☐ No ☐
How do you know? What date did it become ready?	
If the record is not ready to be packaged, what needs to be done to update it to ready?	
If the record is ready to package, should you include Work-Study and/or student loans?	Yes ☐ No ☐
How do you know?	

Packaging Record Review Worksheet

Student Name:	
How was the Packaging record created?	
How do you know?	
Has the record been packaged?	Yes ☐ No ☐
How do you know?	
If the record has been packaged, how much aid was awarded?	
How do you know?	
If the record has not packaged, is it ready to be packaged?	Yes ☐ No ☐
How do you know? What date did it become ready?	
If the record is not ready to be packaged, what needs to be done to update it to ready?	
If the record is ready to package, should you include Work-Study and/or student loans?	Yes ☐ No ☐
How do you know?	

Exercise 9: Printing Offer Award Letters and Queries

Generate *Offer* award letters for the group of students you packaged in Exercise 7

1. Before generating the batch of award letters:
    - Check Packaging System Setup to verify the default for Award Letter Type is O-Offer and the number of copies to be printed is set to 1
    - Check the Global System Setup to ensure that the Default Print is set to Multiple
    - Designate **c:\iam\letters\pkg01** as the file to which the Report File Destination is set
    - Set your preferences for Address and Sort options
    - Indicate the date by which the student should accept the award
    - Include the Needs Analysis since these packaged students have ISIRs
    - Include the Missing Documents Letter
    - Exclude the User-Defined Text
    - Set the other options according to your preferences
    - Include as Selection Criteria the parameter query Packaging Record Source
2. Generate the batch of award letters.
3. Using WordPad (Start/Programs/Accessories/WordPad), open the file to review the award letters generated to be sure they are what you want/expect.

Exercise 10: Printing and Analyzing the Measurement Tools-Funds Report

Print the Measurement Tools-Funds Report to screen.

1. What is the total number of Financial Aid Applicants (entered packaging records) in the database?
2. How does this number compare to the number of students with awards?

Exercise 11: Hand Packaging Awards

Print the List-Unpackaged Students to screen, sort by last name.

1. Hand Package one of the students whose packaging status is set to R.
2. What type of funds will this student be eligible to receive? Why?
3. What should the Packaging Status be?

Exercise 12: Funds, Queries and Multiple Entry to Add Awards

Let's assume that you want all aid applicants to receive a $1,000 institutional non-need based grant. This means you'll need to work with records added by external import, those packaged with no funds and those created manually. For this exercise, we'll work only with records created by external import.

1. Using the Fund Maintenance Worksheet on the following page, create the fund NO NEED.
2. Using the Multiple Entry function:
   - Add the award NO NEED in the amount of 1000 for the year
   - Set the fund decision to A
   - Select students whose packaging records you created with an external file import (What tool is available to you to identify these students?)
3. Are all of the records selected by the query updated?

Exercise 13: Printing Notification Award Letters and Queries

Print notification award letters for students awarded in Exercise 12.

1. Before generating the batch of award letters, change the Packaging System Setup to Award Letter Type N.
2. Go into Global Setup and create additional Notification Letter text using the text provided on page 7-42.
3. Designate **c:\iam\letters\pkg02** as the file to which the Report File Destination is set.
   - Set your preferences for Address and Sort options
   - Exclude the Needs Analysis, since these packaged students do not have ISIRs
   - Include the Missing Documents Letter and the User-Defined Text
   - Set the other options according to your preferences
   - Use Selection Criteria: PACKAGING RECORD SOURCE having a parameter value of E, and generate the batch of award letters.
4. Using WordPad (Start/Programs/Accessories/WordPad), open the file to review the award letters generated to be sure they are what you want/expect.

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Fund Maintenance Worksheet

1. Enter up to eight characters to create a free-form **Fund Code**.	NO NEED
2. Enter up to 25 characters to create a free-form **Fund Description**.	UG Students With No Need
3. Select an **Aid Type** from below.	G

E = FSEOG	**L = Other Need-Based Loan**	**S = Subsidized Stafford**
F = Pell	**N = Non Need-Based Loan**	**U = Unsubsidized Stafford**
G = Any grant or scholarship	**O = Outside Resources**	**W = Federal Work-Study**
K = Perkins	**P = PLUS**	**Y = Other Work-Study**

4. Enter the **Beginning Fund Balance**.	$ 1,000,000

Awards are automatically subtracted from the Beginning Balance. Current (balance) plus Awarded (balance) should equal Beginning Balance (if Adjustments are 0).

5. Enter an **Adjustment** to increase or decrease the Beginning Balance after the initial awarding of the fund.	$

6. Enter parameters to award this fund based on **Remaining Need** (optional).
Does not apply to Fund Types F, O, P, S, U.

#	Minimum Need	Maximum Need	Amount to Award
1			
2			
3			
4			
5			
6			

7. Select the **Packaging Criteria** (optional). Queries match student records with criteria you specify for awarding the fund. For example, Work-Study awards can be limited to students who answered "Yes" on the FAFSA question about the student's interest in Work Study aid. This selection criteria works in addition to the Award Methodology.	

Additional Notification Text

Please carefully review your enclosed award letter and follow the instructions. Note that this award package is based on your full-time enrollment for both the fall and spring semesters of the 2000-2001 academic year. If you will be attending less than full-time, please indicate your enrollment plans.

Appendix A - Working with Queries Supplemental Information

Queries and Tasks Table A-2

Packaging Database Fields Table A-3

Global Database Fields Table A-4

Apps Express Database Fields Table A-5

Packaging Module Predefined Queries A-6

Global Module Predefined Queries A-7

Apps Express Module Predefined Queries A-8

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Create Queries to Perform Packaging Tasks

Task	Module Where Query is Created	Generate/Print Report to Test Query
Add Budget (Process function)	Packaging	List-Entered Packaging Records
Assign Budgets (Multiple Entry function)	Packaging	List-Entered Packaging Records
Assign Award Methodology	Packaging	List-Entered Packaging Records
Assign Fund	Packaging	List-Entered Packaging Records
Add Document (Process function)	App Express	List-Processed ISIRs
Assign Documents (Multiple Entry function)	Global	List-Document Tracking by Student
Import ISIR data into Packaging to create packaging records	App Express	List-Processed ISIRs
Print Award Letters	Packaging	List-Entered Packaging Records
Print Document Tracking Letters	Global	List-Document Tracking by Student
Print User Letters	Global	List-Document Tracking by Student

All Data Fields Available in the Packaging Database

- Academic Year Profile
- Active Transaction
- Active Transaction Date
- Active Transaction ID
- Add Date
- Add Time
- Add User ID
- Alien Registration #
- Amount of Pell
- Auto Zero EFC
- Award Letter
- Award Letter Mailed Date
- Award Letter Sent Count
- Borrower Based
- Budget Amount
- Budget Code
- Budget Title
- Citizenship Status
- College Grade Level
- Current SSN
- Date of Birth
- Date of Birth Change Date
- Date of Legal Residence
- Date Ready for Packaging
- Date Received by CPS
- Default Status
- Degree
- Dependency Status
- Direct Loan Plus
- Direct Loan Subsidized
- Direct Loan Unsubsidized
- Document Status
- Drivers License #
- Drivers License State
- EFC
- Enrollment
- Estimated Pell Grant
- Export to External System
- First Name
- Fund Aid Type
- Fund Calculated Value
- Fund Code
- Fund Current Total
- Fund Decision to Accept
- Fund Previous Total
- Has Correction Record
- Has Document Tracking Record
- Has FAFSA Record
- Has Loan Record
- Has Notes Record
- Has NSLDS Record
- Has Packaging Record
- Has Pell Record
- Has RAD Record
- Has Verification Worksheet Record
- Housing Code
- Institution Use
- Interested in Student Loans
- Interested in Work-Study
- Last Mailed Date
- Last Name
- Letter Count
- Loan Interview Completed
- Local Address
- Local Address Change Date
- Local City
- Local Phone
- Local State
- Local Zip Code
- Low Tuition
- Methodology Code
- Middle Initial
- Name ID
- Original SSN
- Over Award Indicator
- Packaged Date
- Packaging Add Date
- Packaging Record Source
- Packaging Results
- Packaging Status
- Parent Contribution
- Pell EFC
- Pell Eligible Flag
- Pell Verification Status
- Permanent Address
- Permanent Address Change Date
- Permanent City
- Permanent Phone
- Permanent State
- Permanent Zip Code
- Previous Transaction
- Process Date
- Record Source
- Remaining Need
- Satisfactory Academic Progress
- Selected to Print in Next Batch
- Simplified Needs
- SSN Change Date
- State of Legal Residence
- Student's Original SSN
- Total Income
- Trans Paid On
- Transaction #
- Unmet Need Amount
- Update Date
- Update ID
- Update Time
- User Defined Formula 1
- User Defined Formula 2
- User Defined Formula 3
- User Defined Formula 4
- Verification Type

All Data Fields Available in the Global Database

- Active Transaction
- Active Transaction Date
- Active Transaction ID
- Add Date
- Add Time
- Add UserID
- Alien Registration #
- Citizenship Status
- Current SSN
- Date of Birth
- Date of Birth Change Date
- Date of Legal Residence
- Dependency Status
- Document Status
- Drivers License #
- Drivers License State
- Fall Pell
- First Name
- Has Correction Record
- Has Document Tracking Record
- Has FASFA Record
- Has Loan Record
- Has Notes Record
- Has NSLDS Record
- Has Packaging Record
- Has Pell Record
- Has RAD Record
- Has Verification Worksheet Record
- Institution Use
- Last Mailed Date
- Last Name
- Letter Count
- Loan Interview Completed
- Local Address
- Local Address Change Date
- Local City
- Local Phone
- Local State
- Local Zip Code
- Middle Initial
- Name ID
- Original SSN
- Pell Verification Status
- Permanent Address
- Permanent Address Change Date
- Permanent City
- Permanent Phone
- Permanent State
- Permanent Zip Code
- Previous Transaction
- Record Source
- SSN Change Date
- State of Legal Residence
- Trans Paid On
- Transaction #
- Update Date
- Update ID
- Update Time
- ***User-defined fields created in Global module**

Some Data Fields Available in the App Express Database

(See EDE Technical Reference for complete list of ISIR data fields)

Are You Male?	Grade Level in College in 2000-2001	Previous Transaction
Automatic Zero EFC	INS Match Flag	Primary EFC
Citizenship Status	Interested in Student Employment	Prisoner Match
Current SSN	Interested in Student Loans	Reject Reason Codes
Date of Birth	Last Name	SAR C Flag
Date of Birth Change Date	Local Address	Selective Service Match Flag
Date of Legal Residence	Local Address Change Date	Selective Service Registration Flag
Degree/Certificate	Local City	Simplified Needs Test
Dependency Status	Local Phone	SSA Citizenship Flag
Drug Offense Conviction	Local State	SSN Match Flag
Enrollment Plan for Fall 2000	Local Zip Code	SSN Match Flag
Enrollment Plan for Spring 2001	Middle Initial	State of Legal Residence
Enrollment Plan for Summer 2000	Name ID	Student is Selected for Verification
Enrollment Plan for Summer 2001	NSLDS Match Flag	Student's Citizenship Status
Enrollment Plan for Winter 2000-2001	Original SSN	Student's First Name
Federal School Code # 1	Pell Verification Status	Student's Last Name
Federal School Code # 2	Permanent Address	Student's State of Legal Residence
Federal School Code # 3	Permanent Address Change Date	Transaction Number
Federal School Code # 4	Permanent City	*User-defined fields created in Global module
Federal School Code # 5	Permanent Phone	VA Match Flag
Federal School Code # 6	Permanent State	
First Bachelor's Degree by 07-01-2000?	Permanent Zip Code	

Packaging Module Predefined Queries

Packaging Query Title	Query Field
Academic Calendar	AYPROFILE
Add Date Range	Packaging Add Date
Award Methodology	Methodology Code
College Grade Level	College Grade Level
Current SSN	Current SSN
Dependency Status	Dependency Status
EFC Range	EFC
Graduate Student?	College Grade Level
Last Name Range	Last Name
Mailing State	Permanent State
Original SSN	Student's Original SSN
Origination Source	Packaging Record Source
Packaged by Hand	Packaging Status
Packaged by System	Packaging Status AND Methodology Code
Packaged by System with No Methodology	Packaging Status AND Methodology Code
Packaged Date	Packaged Date
Packaging Status	Packaging Status
Processed Date Range	Process Date
SSN Range	Current SSN
Zip Code Range	Permanent Zip Code

Global Module Predefined Queries

Global Query Title	Query Field
Add Date Range	Add Date
Current SSN	Current SSN
Dependency Status	Dependency Status
Last Name Range	Last Name
Original SSN	Original SSN
SSN Range	Original SSN
Zip Code Range	Permanent Zip Code

App Express Module Predefined Queries

Apps Express Query Title	Query Field
Add Date Range	ISIR Import Date
Batch Number	Batch ID
C Code	SAR C Flag
College Grade Level	Std's Year In College
Current SSN	Student Current SSN
Dependency Status	Dependency Status
Early Analysis	Early Analysis
EFC Range	EFC
Graduate Student?	Std's Year In College
Last Name Range	Last Name
Not Selected For Verification	Verification Flag
Rejected Records	Application Reject Codes
School Code	Federal School Code 1-6
School Code #1	Federal School Code 1
School Code #2	Federal School Code 2
School Code #3	Federal School Code 3
School Code #4	Federal School Code 4
School Code #5	Federal School Code 5
School Code #6	Federal School Code 6
Selected For Verification	Verification Flag
SSN Range	Student Current SSN
Transaction Type	Transaction Type
Zip Code Range	Permanent Zip Code

Appendix B - Blank Worksheets

Query Worksheet B-2

Global System Setup Worksheet B-3

Document Tracking Worksheet B-4

Packaging System Setup Worksheet B-5

Academic Year Profile Worksheet B-6

Cost of Attendance Budget Worksheet B-7

Fund Maintenance Worksheet B-8

Award Methodology Worksheet B-9

Packaging Record Review Worksheet B-11

Query Worksheet

What Task do You Want to Perform?	What Module is Available to Create the Query to Perform this Task?
	☐ Apps ☐ Global ☐ DL ☐ Packaging ☐ Pell

Enter a title for the Query that describes the group of students to be selected:

Data Element	Operators	Value
Enter the data field(s) from the Module indicated above	=, <>, <, >, >=, <=, like, not like	☐ Prompt at Execution (to create a parameter query) ☐ Enter free-form or system-assigned value

☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

Global System Setup Worksheet

Allow notepad entries to be edited?	☐ Yes ☐ No
Default System to display?	☐ Global ☐ App Express ☐ Packaging ☐ ______________
Number of Days to reprint Document Tracking Letters?	
Number of Times to reprint Document Tracking Letters?	
Number of Copies of Document Tracking Letters to Print?	
Return to Dialog?	☐ Yes ☐ No
Print Default?	☐ Single Record ☐ Multiple Records
TG ID #	

Document Tracking Worksheet

1. **Document Code:** This code displays on reports and on the Document Tracking tab of the student's record (10-character alphanumeric).

Document Code:

2. **Year:** Enter the year(s), if applicable, that applies to the document begin requested. This prints on reports and on the Document Tracking tab of the student's record (9-character alphanumeric).

Year:

3. **Description:** Enter a free-form description of the document. The description prints on the Document Tracking letter as the item being requested (50-character alphanumeric).

Description:

4. **Criteria:** Enter title of query that selects student records that the document tracking code is assigned.

Criteria:

5. **Automatic Request?** Do you want this document to be added automatically to student records when the Add Documents function is performed?

Automatic Request? Yes ☐ No ☐

6. **Required for Packaging?** Is this document required before your office packages financial aid for students to which the document is assigned?

Required for Packaging? Yes ☐ No ☐

7. **Required for Verification?** Is this document being requested of all students who have been selected for verification by CPS?

Required for Verification? Yes ☐ No ☐

8. **Comments:** This document should be assigned to those student records having one or more of the following ISIR comment codes:

☐ ☐ ☐ ☐ ☐ ☐

Packaging System Setup Worksheet

Enter total number of award letters to be printed per student.	
Enter maximum number of award letters to be sent per student.	
Enter Award Letter Type	☐ O (Offer) ☐ N (Notification)
Allow Pell EFC to be modified?	☐ Yes ☐ No
Enter Packaging Results Default Status	☐ O (Offered) ☐ A (Accepted)
Enter Priority Date Deadline Type	☐ A (Received Date) ☐ P (Processed Date) ☐ R (Ready Date) ☐ U (User Defined Date)
User Defined Date Name (required for Priority Date Deadline Type U)	
Use Low Tuition?	☐ Yes ☐ No
Enter Default Housing Status	☐ 1 (On campus) ☐ 2 (Off campus) ☐ 3 (With parent)

Academic Year Profile Worksheet

Define a code to identify the Academic Year Profile (up to 4 characters, can be alphanumeric).	__ __ __ __	
Is this Academic Year Profile the default Academic Year?	Yes ☐	No ☐
Enter the Academic Year Profile Title (can be alphanumeric).		

Enter Pell Grant Formula

1. ☐	Standard Term 30 weeks. (Formula 1)
2. ☐	Standard Term less than 30 weeks. (Formula 2)
3. ☐	Any Term-based credit hour program. (Formula 3)
4. ☐	Clock Hour and Credit Hour without terms. (Formula 4)
5. ☐	Correspondence Study, non term-based program. (Formula 5)
6. ☐	Correspondence Study, term-based program. (Formula 6)

Enter Program Proration Percent for Pell Grant Formuls 2, 4, 5 ________% (00 to 99)

For calculating the EFC, what is the program length in months?

1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10 ☐ 11 ☐ 12 ☐

Term Breakdown

Percentage across terms cannot exceed 100%
Enter Pell percent for Pell Formulas 3, 4, 5, 6

Term Name (Free Form)	Default Enrollment Status (F,¼,½,< ½, Fall 2000, Winter 2000, etc.)	Pell %	SEOG %	Grant %	Perkins %	WS %	Subsidized Loan %	Other Loan %

Cost of Attendance Budget Worksheet

1. Enter the Budget Code (Up to four alphanumeric characters).	__ __ __ __
2. Establish a priority number (0-999). If a student is selected for more than one budget, the highest priority budget is applied	__ __ __
3. Enter up to fifty (50) characters to create a free-form title.	
4. Select a Query that is used to select the group of students who should receive this budget (optional).	

Budget Component	Budget Amount	User Defined Budget Component	Budget Amount
Tuition & Fees			
Room & Board			
Books & Supplies			
Transportation			
Miscellaneous			

Total	

Fund Maintenance Worksheet

1. Enter up to eight characters to create a free-form **Fund Code**.	_ _ _ _ _ _ _ _
2. Enter up to 25 characters to create a free-form **Fund Description**.	_ _
3. Select an **Aid Type** from below.	

E = FSEOG	**L = Other Need-Based Loan**	**S = Subsidized Stafford**
F = Pell	**N = Non Need-Based Loan**	**U = Unsubsidized Stafford**
G = Any grant or scholarship	**O = Outside Resources**	**W = Federal Work-Study**
K = Perkins	**P = PLUS**	**Y = Other Work-Study**

4. Enter the **Beginning Fund Balance**.	$

Awards are automatically subtracted from the Beginning Balance. Current (balance) plus Awarded (balance) should equal Beginning Balance (if Adjustments are 0).

5. Enter an **Adjustment** to increase or decrease the Beginning Balance after the initial awarding of the fund.	$

6. Enter parameters to award this fund based on **Remaining Need** (optional).
Does not apply to Fund Types F, O, P, S, U.

#	Minimum Need	Maximum Need	Amount to Award
1			
2			
3			
4			
5			
6			

7. Select the **Packaging Criteria** (optional). Queries match student records with criteria you specify for awarding the fund. For example, Work-Study awards can be limited to students who answered "Yes" on the FAFSA question about the student's interest in Work Study aid. This selection criteria works in addition to the Award Methodology.	

Award Methodology Worksheet

1. Establish up to a 4-character code to identify the award methodology		_ _ _ _
2. Enter up to 50 characters to create a free-form description of the award methodology.		
3. Establish a 3-character priority number for this award methodology. If a student is selected for more than one methodology, the highest priority methodology is applied.		_ _ _
4. For Aid Maximums use:	☐ Percentages	☐ Dollar Amounts
5. The maximum percentage or dollar amount of the total award package that is awarded as self-help aid, either work-study or loans.		
6. The maximum percentage or dollar amount of the total award package that can be awarded as gift aid.		
7. Select a Query that is used to select the group of students for this funding package (optional).		

8. Establish award parameters for up to 20 specific funds (Pell Grant is hard coded and therefore not entered on this table).

Identify fund to award	Identify priority of award	Identify minimum award	Identify maximum award	Identify minimum EFC to make award	Identify maximum EFC to make award	Refer to supplemental worksheet*
Fund Code	**Priority**	**Minimum $**	**Maximum $**	**Minimum EFC**	**Maximum EFC**	**Remaining Need**

*Award Methodology Remaining Need Worksheet

Fund Code:

#	Minimum Need	Maximum Need	Amount to Award
1			
2			
3			
4			
5			
6			

Fund Code:

#	Minimum Need	Maximum Need	Amount to Award
1			
2			
3			
4			
5			
6			

Fund Code:

#	Minimum Need	Maximum Need	Amount to Award
1			
2			
3			
4			
5			
6			

Fund Code:

#	Minimum Need	Maximum Need	Amount to Award
1			
2			
3			
4			
5			
6			

Fund Code:

#	Minimum Need	Maximum Need	Amount to Award
1			
2			
3			
4			
5			
6			

Packaging Record Review Worksheet

Student Name:	
How was the Packaging record created?	
How do you know?	
Has the record been packaged?	Yes ☐ No ☐
How do you know?	
If the record has been packaged, how much aid was awarded?	
How do you know?	
If the record has not packaged, is it ready to be packaged?	Yes ☐ No ☐
How do you know? What date did it become ready?	
If the record is not ready to be packaged, what needs to be done to update it to ready?	
If the record is ready to package, should you include Work-Study and/or student loans?	Yes ☐ No ☐
How do you know?	

Appendix C - Apply What You Learned Answer Keys

Unit 1

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Unit 2

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Unit 3

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Unit 5

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Unit 7

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Apply What You Learned (page 1-49)

EDExpress Online Help

F 1. The *What's New for 2000-2001* feature of EDExpress Online Help details new federal financial aid regulations.

T 2. The number of Online Help categories available to you depends on the version of EDExpress you're using as well as what modules you've installed.

F 3. You can use the *Annotate* function to customize Help text by adding your own comments. Customized Help text can be identified by the exclamation mark icon that displays just before the title of the topic.

T 4. Use the *F1* function to access help on an individual data field within an open student record.

F 5. After selecting *Using Help* from the main toolbar menu, tabs for *Contents*, *Index*, and *Find* display. *Index* displays an alphabetical list of FinAid-L topics.

Working with Queries

G = Global, P = Packaging, A = App Express

G 1. Generate/print Document Tracking Letters

P 2. Assign Funds

A 3. Add Documents (Process batch function)

A 4. Import ISIR data into Packaging module to create packaging records

P 5. Generate/print Award Letters

P 6. Add Budgets (Process batch function)

G 7. Assign Documents (Multiple Entry/Global function)

P 8. Assign Budgets (Multiple Entry/Packaging function)

Document Tracking Worksheet (page 2-45)

1. **Document Code:** This code displays on reports and on the Document Tracking tab of the student's record (10-character alphanumeric).

Document Code: DEP VW

2. **Year:** Enter the year(s), if applicable, that applies to the document begin requested. This prints on reports and on the Document Tracking tab of the student's record (9-character alphanumeric).

Year: 2000-2001

3. **Description:** Enter a free-form description of the document. The description prints on the Document Tracking letter as the item being requested (50-character alphanumeric).

Description: 2000-2001 Dependent Verification Worksheet

4. **Criteria:** Enter title of query that selects student records that the document tracking code is assigned.

Criteria: Selected for Verification - Dependent

5. **Automatic Request?** Do you want this document to be added automatically to student records when the Add Documents function is performed?

Automatic Request? Yes ☐ No ☒

6. **Required for Packaging?** Is this document required before your office packages financial aid for students to which the document is assigned?

Required for Packaging? Yes ☐ No ☒

7. **Required for Verification?** Is this document being requested of all students who have been selected for verification by CPS?

Required for Verification? Yes ☒ No ☐

8. **Comments:** This document should be assigned to those student records having one or more of the following ISIR comment codes:

Document Tracking Worksheet (page 2-45)

1. **Document Code:** This code displays on reports and on the Document Tracking tab of the student's record (10-character alphanumeric).

Document Code: PAR TAX

2. **Year:** Enter the year(s), if applicable, that applies to the document begin requested. This prints on reports and on the Document Tracking tab of the student's record (9-character alphanumeric).

Year: 2000-2001

3. **Description:** Enter a free-form description of the document. The description prints on the Document Tracking letter as the item being requested (50-character alphanumeric).

Description: Signed Copy of Parents' 1999 Federal Tax Return

4. **Criteria:** Enter title of query that selects student records that the document tracking code is assigned.

Criteria: Selected for Verification - Dependent

5. **Automatic Request?** Do you want this document to be added automatically to student records when the Add Documents function is performed?

Automatic Request? Yes ☐ No ☒

6. **Required for Packaging?** Is this document required before your office packages financial aid for students to which the document is assigned?

Required for Packaging? Yes ☐ No ☒

7. **Required for Verification?** Is this document being requested of all students who have been selected for verification by CPS?

Required for Verification? Yes ☒ No ☐

8. **Comments:** This document should be assigned to those student records having one or more of the following ISIR comment codes:

☐ ☐ ☐ ☐ ☐ ☐

Document Tracking Worksheet (page 2-45)

1. **Document Code:** This code displays on reports and on the Document Tracking tab of the student's record (10-character alphanumeric).

Document Code: STU TAX

2. **Year:** Enter the year(s), if applicable, that applies to the document begin requested. This prints on reports and on the Document Tracking tab of the student's record (9-character alphanumeric).

Year: 2000-2001

3. **Description:** Enter a free-form description of the document. The description prints on the Document Tracking letter as the item being requested (50-character alphanumeric).

Description: Signed Copy of Student's 1999 Federal Tax Return

4. **Criteria:** Enter title of query that selects student records that the document tracking code is assigned.

Criteria: Selected for Verification

5. **Automatic Request?** Do you want this document to be added automatically to student records when the Add Documents function is performed?

Automatic Request? Yes ☐ No ☒

6. **Required for Packaging?** Is this document required before your office packages financial aid for students to which the document is assigned?

Required for Packaging? Yes ☐ No ☒

7. **Required for Verification?** Is this document being requested of all students who have been selected for verification by CPS?

Required for Verification? Yes ☒ No ☐

8. **Comments:** This document should be assigned to those student records having one or more of the following ISIR comment codes:

Note: You might also need to create a document to track the receipt of a signed copy of the spouse's federal tax return. If needed, it may be easier to add the document to the student's record manually.

Document Tracking Worksheet (page 2-45)

1. **Document Code:** This code displays on reports and on the Document Tracking tab of the student's record (10-character alphanumeric).

Document Code: INDEP VW

2. **Year:** Enter the year(s), if applicable, that applies to the document begin requested. This prints on reports and on the Document Tracking tab of the student's record (9-character alphanumeric).

Year: 2000-2001

3. **Description:** Enter a free-form description of the document. The description prints on the Document Tracking letter as the item being requested (50-character alphanumeric).

Description: 2000-2001 Independent Verification Worksheet

4. **Criteria:** Enter title of query that selects student records that the document tracking code is assigned.

Criteria: Selected for Verification - Independent

5. **Automatic Request?** Do you want this document to be added automatically to student records when the Add Documents function is performed?

Automatic Request? Yes ☐ No ☒

6. **Required for Packaging?** Is this document required before your office packages financial aid for students to which the document is assigned?

Required for Packaging? Yes ☐ No ☒

7. **Required for Verification?** Is this document being requested of all students who have been selected for verification by CPS?

Required for Verification? Yes ☒ No ☐

8. **Comments:** This document should be assigned to those student records having one or more of the following ISIR comment codes:

☐ ☐ ☐ ☐ ☐ ☐

Query Worksheet (page 2-45)

What Task do You Want to Perform?	What Module is Available to Create the Query to Perform this Task?
Assign Verification Documents to Student Records	☒ Apps ☐ Global ☐ DL ☐ Packaging ☐ Pell

Enter a title for the Query that describes the group of students to be selected:
Selected for Verification - Independent

Data Element	Operators	Value
Enter the data field(s) from the Module indicated above	=, <>, <, >, >=, <=, like, not like	☐ Prompt at Execution (to create a parameter query) ☒ Enter free-form or system-assigned value
	☐ Left (☐ Right)	
Verification Flag	=	Y
☒ And ☐ Or	☐ Left (☐ Right)	
Dependency Status	=	I
☐ And ☐ Or	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	

Apply What You Learned (page 2-70)

1. User-defined letters are created in the **Global** module.
2. The three categories of user-defined letters that you can create in EDExpress are **Award**, **Document Tracking**, and **User or general purpose**.
3. EDExpress provides two types of award letter that typically are sent to students, the **Offer** or **Notification**.
4. The system default indicating which type of award letter to generate is selected in the **Packaging** System setup.
5. EDExpress also gives you the option of including with the award letter a **Missing Documents** letter, which prints as a supplemental page to remind the student of documents that are needed.
6. If you choose to create additional text for the award letter, this additional text prints as **an additional or cover page to the award letter**.
7. In the User-Defined Text setup, Document Tracking Letters include 2 blocks of text. You can create up to 12 lines of additional text in Text Block **1**.
8. In Text Block **2** of Document Tracking Letters, you can modify the predefined text.
9. To restore predefined text for both Award and Document Tracking Letters, you select the **Reset** button in User-Defined Text setup.
10. You can create **five (5)** general purpose/User Letters to send to students.

Academic Year Profile Worksheet (page 2-86)

Define a code to identify the Academic Year Profile (up to 4 characters, can be alphanumeric).	T R I M	
Is this Academic Year Profile the default Academic Year?	Yes ☐	No ☒

Enter the Academic Year Profile Title (can be alphanumeric).

2000-2001 Trimester

Enter Pell Grant Formula

1. ☐	Standard Term 30 weeks. (Formula 1)
2. ☐	Standard Term less than 30 weeks. (Formula 2)
3. ☒	Any Term-based credit hour program. (Formula 3)
4. ☐	Clock Hour and Credit Hour without terms. (Formula 4)
5. ☐	Correspondence Study, non term-based program. (Formula 5)
6. ☐	Correspondence Study, term-based program. (Formula 6)

Enter Program Proration Percent for Pell Grant Formuls 2, 4, 5 ________% (00 to 99)

For calculating the EFC, what is the program length in months?

1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☒ 10 ☐ 11 ☐ 12 ☐

Term Breakdown
Percentage across terms cannot exceed 100%
Enter Pell percent for Pell Formulas 3, 4, 5, 6

Term Name (Free Form)	Default Enrollment Status (F,¼,½,< ½, Fall 2000, Winter 2000, etc.)	Pell %	SEOG %	Grant %	Perkins %	WS %	Subsidized Loan %	Other Loan %
Term 1	**Full time**	**33.33**	**33.33**	**33.33**	**33.33**	**33.33**	**33.33**	**33.33**
Term 2	**Full time**	**33.33**	**33.33**	**33.33**	**33.33**	**33.33**	**33.33**	**33.33**
Term 3	**Full time**	**33.33**	**33.33**	**33.33**	**33.33**	**33.33**	**33.33**	**33.33**

Fund Maintenance Worksheet (page 2-132)

1. Enter up to eight characters to create a free-form **Fund Code**. FSEOG

2. Enter up to 25 characters to create a free-form **Fund Description**. Federal SEOG

3. Select an **Aid Type** from below. E

E = FSEOG
F = Pell
G = Any grant or scholarship
K = Perkins
L = Other Need-Based Loan
N = Non Need-Based Loan
O = Outside Resources
P = PLUS
S = Subsidized Stafford
U = Unsubsidized Stafford
W = Federal Work-Study
Y = Other Work-Study

4. Enter the **Beginning Fund Balance**. $ 275,000

Awards are automatically subtracted from the Beginning Balance. Current (balance) plus Awarded (balance) should equal Beginning Balance (if Adjustments are 0).

5. Enter an **Adjustment** to increase or decrease the Beginning Balance after the initial awarding of the fund. $

6. Enter parameters to award this fund based on **Remaining Need** (optional). Does not apply to Fund Types F, O, P, S, U.

#	Minimum Need	Maximum Need	Amount to Award
1	1000	3500	1000
2	3501	99999	2000
3			
4			
5			
6			

7. Select the **Packaging Criteria** (optional). Queries match student records with criteria you specify for awarding the fund. For example, Work-Study awards can be limited to students who answered "Yes" on the FAFSA question about the student's interest in Work Study aid. This selection criteria works in addition to the Award Methodology.

Undergraduates, EFC < 501

Query Worksheet (page 2-132)

What Task do You Want to Perform?	What Module is Available to Create the Query to Perform this Task?
Assign Fund to Student Records	☐ Apps ☐ Global ☐ DL ☒ Packaging ☐ Pell

Enter a title for the Query that describes the group of students to be selected:
Undergraduates, EFC < 501

Data Element	Operators	Value
Enter the data field(s) from the Module indicated above	=, <>, <, >, >=, <=, like, not like	☐ Prompt at Execution (to create a parameter query) ☒ Enter free-form or system-assigned value

☒ Left (☐ Right)

College Grade Level	**>=**	**1**

☒ And ☐ Or ☐ Left (☒ Right)

College Grade Level	**<=**	**6**

☒ And ☐ Or ☐ Left (☐ Right)

EFC	**<**	**501**

☐ And ☐ Or ☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

Fund Maintenance Worksheet (page 2-169)

1. Enter up to eight characters to create a free-form **Fund Code**. FWS

2. Enter up to 25 characters to create a free-form **Fund Description**. Federal Work-Study

3. Select an **Aid Type** from below. W

E = FSEOG
F = Pell
G = Any grant or scholarship
K = Perkins
L = Other Need-Based Loan
N = Non Need-Based Loan
O = Outside Resources
P = PLUS
S = Subsidized Stafford
U = Unsubsidized Stafford
W = Federal Work-Study
Y = Other Work-Study

4. Enter the **Beginning Fund Balance**. $ 200,000

Awards are automatically subtracted from the Beginning Balance. Current (balance) plus Awarded (balance) should equal Beginning Balance (if Adjustments are 0).

5. Enter an **Adjustment** to increase or decrease the Beginning Balance after the initial awarding of the fund. $

6. Enter parameters to award this fund based on **Remaining Need** (optional). Does not apply to Fund Types F, O, P, S, U.

#	Minimum Need	Maximum Need	Amount to Award
1			
2			
3			
4			
5			
6			

7. Select the **Packaging Criteria** (optional). Queries match student records with criteria you specify for awarding the fund. For example, Work-Study awards can be limited to students who answered "Yes" on the FAFSA question about the student's interest in Work Study aid. This selection criteria works in addition to the Award Methodology.

Note: Beginning balance for FWS would be tied to your school's authorization for campus-based funds.

Fund Maintenance Worksheet (page 2-169)

1. Enter up to eight characters to create a free-form **Fund Code**.	Perkins
2. Enter up to 25 characters to create a free-form **Fund Description**.	Perkins Loan
3. Select an **Aid Type** from below.	K

E = FSEOG
F = Pell
G = Any grant or scholarship
K = Perkins
L = Other Need-Based Loan
N = Non Need-Based Loan
O = Outside Resources
P = PLUS
S = Subsidized Stafford
U = Unsubsidized Stafford
W = Federal Work-Study
Y = Other Work-Study

4. Enter the **Beginning Fund Balance**.	$ 125,000

Awards are automatically subtracted from the Beginning Balance. Current (balance) plus Awarded (balance) should equal Beginning Balance (if Adjustments are 0).

5. Enter an **Adjustment** to increase or decrease the Beginning Balance after the initial awarding of the fund.	$

6. Enter parameters to award this fund based on **Remaining Need** (optional).
Does not apply to Fund Types F, O, P, S, U.

#	Minimum Need	Maximum Need	Amount to Award
1	5000	8000	1000
2	8001	99999	2000
3			
4			
5			
6			

7. Select the **Packaging Criteria** (optional). Queries match student records with criteria you specify for awarding the fund. For example, Work-Study awards can be limited to students who answered "Yes" on the FAFSA question about the student's interest in Work Study aid. This selection criteria works in addition to the Award Methodology.	

Note: Beginning balance for Perkins Loan would be tied to your school's authorization for campus-based funds.

Fund Maintenance Worksheet (page 2-169)

1. Enter up to eight characters to create a free-form **Fund Code**.	WTBCC
2. Enter up to 25 characters to create a free-form **Fund Description**.	WTBCC Grant
3. Select an **Aid Type** from below.	G

E = FSEOG
F = Pell
G = Any grant or scholarship
K = Perkins
L = Other Need-Based Loan
N = Non Need-Based Loan
O = Outside Resources
P = PLUS
S = Subsidized Stafford
U = Unsubsidized Stafford
W = Federal Work-Study
Y = Other Work-Study

4. Enter the **Beginning Fund Balance**.	$ 1,000,000

Awards are automatically subtracted from the Beginning Balance. Current (balance) plus Awarded (balance) should equal Beginning Balance (if Adjustments are 0).

5. Enter an **Adjustment** to increase or decrease the Beginning Balance after the initial awarding of the fund.	$

6. Enter parameters to award this fund based on **Remaining Need** (optional).
Does not apply to Fund Types F, O, P, S, U.

#	Minimum Need	Maximum Need	Amount to Award
1	2500	4000	1500
2	4001	99999	2500
3			
4			
5			
6			

7. Select the **Packaging Criteria** (optional). Queries match student records with criteria you specify for awarding the fund. For example, Work-Study awards can be limited to students who answered "Yes" on the FAFSA question about the student's interest in Work Study aid. This selection criteria works in addition to the Award Methodology.	

Fund Maintenance Worksheet (page 2-169)

1. Enter up to eight characters to create a free-form **Fund Code**.	Sub_____
2. Enter up to 25 characters to create a free-form **Fund Description**.	Federal Subsidized Loan___
3. Select an **Aid Type** from below.	S

E = FSEOG
F = Pell
G = Any grant or scholarship
K = Perkins
L = Other Need-Based Loan
N = Non Need-Based Loan
O = Outside Resources
P = PLUS
S = Subsidized Stafford
U = Unsubsidized Stafford
W = Federal Work-Study
Y = Other Work-Study

4. Enter the **Beginning Fund Balance**.	$ 99,999,999 (System default)

Awards are automatically subtracted from the Beginning Balance. Current (balance) plus Awarded (balance) should equal Beginning Balance (if Adjustments are 0).

5. Enter an **Adjustment** to increase or decrease the Beginning Balance after the initial awarding of the fund.	$

6. Enter parameters to award this fund based on **Remaining Need** (optional).
Does not apply to Fund Types F, O, P, S, U.

#	Minimum Need	Maximum Need	Amount to Award
1			
2			
3			
4			
5			
6			

7. Select the **Packaging Criteria** (optional). Queries match student records with criteria you specify for awarding the fund. For example, Work-Study awards can be limited to students who answered "Yes" on the FAFSA question about the student's interest in Work Study aid. This selection criteria works in addition to the Award Methodology.	

Fund Maintenance Worksheet (page 2-169)

1. Enter up to eight characters to create a free-form **Fund Code**.	PLUS
2. Enter up to 25 characters to create a free-form **Fund Description**.	Federal Parent(PLUS)Loan
3. Select an **Aid Type** from below.	P

E = FSEOG	**L = Other Need-Based Loan**	**S = Subsidized Stafford**
F = Pell	**N = Non Need-Based Loan**	**U = Unsubsidized Stafford**
G = Any grant or scholarship	**O = Outside Resources**	**W = Federal Work-Study**
K = Perkins	**P = PLUS**	**Y = Other Work-Study**

4. Enter the **Beginning Fund Balance**.	$ 99,999,999 (System default)

Awards are automatically subtracted from the Beginning Balance. Current (balance) plus Awarded (balance) should equal Beginning Balance (if Adjustments are 0).

5. Enter an **Adjustment** to increase or decrease the Beginning Balance after the initial awarding of the fund.	$

6. Enter parameters to award this fund based on **Remaining Need** (optional).
Does not apply to Fund Types F, O, P, S, U.

#	Minimum Need	Maximum Need	Amount to Award
1			
2			
3			
4			
5			
6			

7. Select the **Packaging Criteria** (optional). Queries match student records with criteria you specify for awarding the fund. For example, Work-Study awards can be limited to students who answered "Yes" on the FAFSA question about the student's interest in Work Study aid. This selection criteria works in addition to the Award Methodology.	

Query Worksheet (page 2-169)

What Task do You Want to Perform?	What Module is Available to Create the Query to Perform this Task?
Assign Packaging Records to Award Methodology	☐ Apps ☐ Global ☐ DL ☒ Packaging ☐ Pell

Enter a title for the Query that describes the group of students to be selected:
Undergraduates (Dependents), EFC < 501

Data Element	Operators	Value
Enter the data field(s) from the Module indicated above	=, <>, <, >, >=, <=, like, not like	☐ Prompt at Execution (to create a parameter query) ☒ Enter free-form or system-assigned value
	☐ Left (☐ Right)	
EFC	**<**	**501**
☒ And ☐ Or	☒ Left (☐ Right)	
College Grade Level	**>=**	**1**
☒ And ☐ Or	☐ Left (☒ Right)	
College Grade Level	**<=**	**6**
☒ And ☐ Or	☐ Left (☒ Right)	
Dependency Status	**=**	**D**
☐ And ☐ Or	☐ Left (☐ Right)	
☐ And ☐ Or	☐ Left (☐ Right)	

Award Methodology Worksheet (page 2-169)

1. Establish up to a 4-character code to identify the award methodology		U G - D
2. Enter up to 50 characters to create a free-form description of the award methodology. **Undergraduates (Dependent), EFC < 501**		
3. Establish a 3-character priority number for this award methodology. If a student is selected for more than one methodology, the highest priority methodology is applied.		1 _ _
4. For Aid Maximums use:	☑ Percentages	☐ Dollar Amounts
5. The maximum percentage or dollar amount of the total award package that is awarded as self-help aid, either work-study or loans.		**100%**
6. The maximum percentage or dollar amount of the total award package that can be awarded as gift aid.		**80%**
7. Select a Query that is used to select the group of students for this funding package (optional). **Undergraduates (Dependent), EFC < 501**		

8. Establish award parameters for up to 20 specific funds (Pell Grant is hard coded and therefore not entered on this table).

Identify fund to award	Identify priority of award	Identify minimum award	Identify maximum award	Identify minimum EFC to make award	Identify maximum EFC to make award	Refer to supplemental worksheet*
Fund Code	**Priority**	**Minimum $**	**Maximum $**	**Minimum EFC**	**Maximum EFC**	**Remaining Need**
FSEOG	1	1000	2500	0	3100	*
FWS	2	1000	2500	0	13500	
Perkins	3	1000	2000	0		*
WTBCC	4	500	3500	0	13500	*
Sub	5	200	99,999	0	99999	
PLUS	6	200	99,999	0	99999	

*Award Methodology Remaining Need Worksheet

(page 2-169)

Fund Code: FSEOG

#	Minimum Need	Maximum Need	Amount to Award
1	2000	3500	1000
2	3501	99999	2500
3			
4			
5			
6			

Fund Code: Perkins

#	Minimum Need	Maximum Need	Amount to Award
1	5000	8000	1000
2	8001	99999	2000
3			
4			
5			
6			

Fund Code: WTBCC

#	Minimum Need	Maximum Need	Amount to Award
1	2500	4000	1500
2	4001	99999	2500
3			
4			
5			
6			

Fund Code:

#	Minimum Need	Maximum Need	Amount to Award
1			
2			
3			
4			
5			
6			

Fund Code:

#	Minimum Need	Maximum Need	Amount to Award
1			
2			
3			
4			
5			
6			

Apply What You Learned (page 2-199)

1. C of the setups for the Packaging process are done within the Packaging module.
   - (a) All
   - (b) None
   - (c) Most
2. Queries can be used with EDExpress functions wherever you see B:
   - (a) Dialog box
   - (b) Selection criteria button
   - (c) Ellipsis button
   - (d) Query dialog box
3. A new feature in EDExpress allows you to C to create new queries.
   - (a) Search a web site
   - (b) Write statements in Structured Query Language (SQL)
   - (c) Modify an existing query
   - (d) Phone a friend
4. Document tracking allows you to D:
   - (a) Monitor the request and receipt of documents
   - (b) Update records
   - (c) Delay packaging or disbursement for a group of students
   - (d) All of the above
5. With the Packaging module you can import data from or export data to C:
   - (a) An external database
   - (b) Other modules of EDExpress
   - (c) All of the above
   - (d) None of the above

6. User Data, Document Tracking, and Global System setups are located in the __A__ module of EDExpress:
   - (a) Global
   - (b) Apps
   - (c) Packaging
   - (d) Direct Loan
7. For help with Packaging in EDExpress you can __D__:
   - (a) Search by topic
   - (b) Press the Help button
   - (c) Browse the Help index
   - (d) All of the above
8. Satisfactory Academic Progress (SAP) profiles allow you to __A__:
   - (a) Prevent students not meeting user-defined criteria from being packaged
   - (b) Receive notification when a student drops a course
   - (c) Chat on line with students' academic advisors
   - (d) All of the above
9. Within the Packaging module you can create user defined formulas using __A__:
   - (a) Any numeric field in the Applications or Packaging Database
   - (b) Any field within EDExpress
   - (c) Queries
   - (d) Both a and c
10. The Fund Maintenance feature of the Packaging module allows you to create __D__ funds:
    - (a) Federal
    - (b) State
    - (c) Institutional and external
    - (d) All of the above
11. Within the Packaging module you can create Budgets for __A__:
    - (a) All your student populations
    - (b) Undergraduate students only
    - (c) Full time students only
    - (d) Only students living on campus

Appendix C—Answer Key

12. A new feature of EDExpress allows you to modify text in ___C___:
    - (a) Award letters
    - (b) Document tracking letters
    - (c) All of the above
    - (d) None of the above
13. The Academic Year Profile ___D___:
    - (a) Is required when importing data to create packaging records
    - (b) Lists the terms for which student is awarded aid
    - (c) Distributes the percentage of each aid fund to award per term
    - (d) All of the above
14. An award methodology determines ___A___:
    - (a) Which funds and what amounts are awarded to a student
    - (b) Which type of award letter the student receives
    - (c) The student's SAP value
    - (d) All of the above
15. Options within the Packaging System Setup include ___D___:
    - (a) Default Housing status
    - (b) Number of award letters to print for each student
    - (c) Type of award letter to print for each student
    - (d) All of the above

Apply What You Learned (page 3-47)

1. Name the three fields that must contain valid data in order for the student's record to be ready for packaging:
   AYP, Budget, College Grade Level
2. If the Default status on the Packaging record is set to Y, the system will not be able to package **federal** aid (type) for the student.
3. If a student has been packaged, you can view the detail of the aid awarded by clicking the **Awarded Funds** button.
4. The field that indicates how the record was created is the **Record Source**.
5. A value of Y in the Overaward Indicator field indicates that the student's awards exceed the student's **need**.
6. A Packaging Status of **R** indicates that the record is ready to be packaged.
7. A Packaging Status of **H** indicates that the record has been packaged by hand.
8. A Packaging Status of N indicates that the record **is not ready to be packaged**.
9. The Enrollment level in each term impacts only the student's **Pell** award.
10. The value in the **SAP** field describes the student's academic progress.

Apply What You Learned (page 3-78)

1. Of the 30 ISIR records in the App Express database, 25 should import into the Packaging database.

2. 17 external records should import into the Packaging database.

3. Packaging Status = N. Double check the AYP, Budget, and College Grade Level fields to be sure they contain values. Record Source = M (Manual entry).

   You should not use the Automatic Package feature to award this student. The Package feature runs off of Award Methodologies, which are designed to award aid based on need. Also, the SAP code IS indicates that this an international student and that automatic packaging should be prevented. You should hand package this student.

4. - Budget Code = 1
   - Packaging Status = R

Apply What You Learned (page 5-7)

5. 852-36-9741 is awarded
   998-46-6218 is not ready for packaging
   998-48-8196 is not ready for packaging
   International Student is awarded
   998-20-1810 is awarded

6. 998-46-6218 - needs Budget Code
   998-48-8196 - needs Budget Code

Query Worksheet (page 5-7)

What Task do You Want to Perform?	What Module is Available to Create the Query to Perform this Task?
Award by Major	☐ Apps ☐ Global ☐ DL ☒ Packaging ☐ Pell

Enter a title for the Query that describes the group of students to be selected:
Major

Data Element	Operators	Value
Enter the data field(s) from the Module indicated above	=, <>, <, >, >=, <=, like, not like	☒ Prompt at Execution (to create a parameter query) ☐ Enter free-form or system-assigned value

☐ Left (☐ Right)

Major	**=**	**Prompt at execution**

☐ And ☐ Or ☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

☐ And ☐ Or ☐ Left (☐ Right)

Packaging Record Review Worksheet (page 5-31)

Student Name:	**Brendan Barley**
How was the Packaging record created? **ISIR Import**	
How do you know? **Record Source = I**	
Has the record been packaged?	Yes ☒ No ☐
How do you know? **Packaging Status = P** **Packaging Results = 0** **Awarded Fund > 0**	
If the record has been packaged, how much aid was awarded? **12,125**	
How do you know? **Awarded Funds = 12,1251**	
If the record has not packaged, is it ready to be packaged?	Yes ☒ No ☐
How do you know? What date did it become ready? **Ready date 3/16/2000**	
If the record is not ready to be packaged, what needs to be done to update it to ready? **N/A (A/Y Profile, Budget Code, College Grade Level)**	
If the record is ready to package, should you include Work-Study and/or student loans?	Yes ☐ No ☒
How do you know? **Student didn't indicate interest in FWS and loan**	

Packaging Record Review Worksheet (page 5-31)

Student Name:	**William D'Mary**
How was the Packaging record created? **N/A**	
How do you know? **Record Source has no Information**	
Has the record been packaged?	Yes ☐ No ☒
How do you know? **Packaging Status = N** **Packaging Icons all grayed out**	
If the record has been packaged, how much aid was awarded? **N/A**	
How do you know?	
If the record has not packaged, is it ready to be packaged?	Yes ☐ No ☒
How do you know? What date did it become ready?	
If the record is not ready to be packaged, what needs to be done to update it to ready? **A/Y Profile; College Grade Level; Budget Code)**	
If the record is ready to package, should you include Work-Study and/or student loans?	Yes ☐ No ☐
How do you know?	

Packaging Record Review Worksheet (page 5-31)

Student Name:	**Amy A. Ambridge**
How was the Packaging record created? **ISIR Import**	
How do you know? **Record Source = I**	
Has the record been packaged?	Yes ☒ No ☐
How do you know? **Packaging Status = U, so it had to have been packaged prior to being unpackaged**	
If the record has been packaged, how much aid was awarded? **0**	
How do you know? **Awarded Funds = 0**	
If the record has not packaged, is it ready to be packaged?	Yes ☒ No ☐
How do you know? What date did it become ready? **Packaging Status = U; Ready date = 3/16/2000**	
If the record is not ready to be packaged, what needs to be done to update it to ready? **N/A**	
If the record is ready to package, should you include Work-Study and/or student loans?	Yes ☒ No ☐
How do you know? **Student indicated an interest in FWS and loans; EFC = 0**	

Apply What You Learned (page 6-19)

In the blank before each system-defined report, write the letter of the corresponding EDExpress database in which the report would be generated/printed.
G = Global, P = Packaging

P 1. Packaged Students by Fund Code
P 2. Record Layout-Import External Add
G 3. Document Tracking by Students
G 4. User-Defined Queries
G 5. User Data
G 6. Document Tracking by Document Code
G 7. User Letters
P 8. Entered Packaging Records
P 9. FISAP-Eligible Dependent Students
P 10. Award Letters

On the line below each report description, identify the name of the report.

1. This report provides a listing of all students in the Packaging database without regard to their packaging status.

   Entered Packaging Records

2. This listing includes any student whose packaging status is not equal to P (Packaged), H (Hand Packaged), or M (Manually Packaged) to help you determine those students who still need to be packaged.

   Unpackaged Students

3. This report provides real-time information about total amounts awarded from each fund.

   Fund Maintenance

4. This report lists the totals awarded by aid type along with the number and percentage of students who receive funds from each aid type.

   Measurement Tools

5. This report includes a detailed listing, as well as the total number, of students assigned individual documents. For each student record, the report also lists the document received date.

   Document Tracking by Code

Apply What You Learned (page 7-8)

Advanced Exercise

2. 739-14-6825 — Budget Code #5

606-09-5013 — Budget Code #6

617-27-3240 — Budget Code #6

998-20-1810 — Budget Code #1

Apply What You Learned (page 7-36)

Advanced Exercise

2. No. Because records packaged by hand were excluded, students awarded music scholarships were not included in this packaging process. Because the music scholarship is non-need based and the packaging process runs off of Award Methodologies based on need, each student receiving a music award would need to be packaged by hand.

Packaging Record Review Worksheet (page 7-36)

Student Name:	**Isaac Isthmus**
How was the Packaging record created? **ISIR Import**	
How do you know? **Record Source = I**	
Has the record been packaged?	Yes ☐ No ☒
How do you know? **Packaging Status = N**	
If the record has been packaged, how much aid was awarded? **N/A**	
How do you know?	
If the record has not packaged, is it ready to be packaged?	Yes ☐ No ☒
How do you know? What date did it become ready? **N/A**	
If the record is not ready to be packaged, what needs to be done to update it to ready? **Need Budget Code (no budget created for graduate students)**	
If the record is ready to package, should you include Work-Study and/or student loans?	Yes ☐ No ☐
How do you know? **N/A**	

Packaging Record Review Worksheet (page 7-36)

Student Name:	**Acup Sanka**
How was the Packaging record created? **ISIR Import**	
How do you know? **Record Source = I**	
Has the record been packaged?	Yes ☐ No ☒
How do you know? **Packaging Status = N**	
If the record has been packaged, how much aid was awarded? **N/A**	
How do you know?	
If the record has not packaged, is it ready to be packaged?	Yes ☐ No ☒
How do you know? What date did it become ready? **N/A**	
If the record is not ready to be packaged, what needs to be done to update it to ready? **Need SS REG, document required for packaging**	
If the record is ready to package, should you include Work-Study and/or student loans?	Yes ☐ No ☐
How do you know? **N/A**	

Apply What You Learned (page 7-39)

Exercise 10

1. 48 (same as Total Number of Financial Aid Applicants at this institution):

    30 created by ISIR import

    17 created by external import

    1 created by manual entry

2. 24 students receiving aid

Exercise 11

3. The Packaging Status should be H, which means you should have manually updated this field.

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Apply What You Learned (page 7-40)

Exercise 12

2. Use the parameter query Packaging Record Source to select student records created by external import, with the value "E."

3. Of the 17 records selected, 8 are not updated.

Exercise 13

3. No records are selected. For each record awarded in Exercise 12, the Packaging Status first needs to be manually updated from "R" to "H" to indicate that the awards were added by hand.

Appendix D - Sample User Letters

EDExpress Letters System-Defined Features D-2
Notification Award Letter D-3
Offer Award Letter D-4
Additional Award Letter Text D-5
Award Missing Information Letter D-6
Document Tracking Letter D-7
Document Tracking Letter with User Text D-8
User Letter D-9

EDExpress Letters: System-Defined Features

	Offer Award Letters			Notification Award Letters				
	Offer	Additional Letter Text	Missing Documents Letter	Notification	Additional Letter Text	Missing Documents Letter	User Letter	Document Tracking Letter
Letter Heading	FA Award Offer			FA Award Notification			User-Letter Name	Document Tracking
Date	Yes	Yes		Yes	Yes		Yes	Yes
Return Date	Yes							
Student's Name	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Student's Address	Yes	Yes		Yes	Yes		Yes	Yes
Student's ID Number	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
School's Name and Address	Yes	Yes		Yes	Yes		Yes	Yes
Salutation	Yes	Yes		Yes	Yes			Yes
Block 1 Text	User-defined (up to 40 lines)	Define additional text in Block 1, Offer	User-defined (up to 12 lines)	User-defined (up to 40 lines)	Define additional text in Block 1, Notification	User-defined (up to 12 lines)	User-defined (up to 42 lines)	User-defined (up to 12 lines)
Block 2 Text	Predefined			Predefined		Predefined		Predefined
Block 3 Text	Predefined		User-defined (up to 6 lines)	Predefined		User-defined (up to 6 lines)		
Line for Student's Signature	Yes			Yes				

FINANCIAL AID AWARD NOTIFICATION
2000-2001 AWARD YEAR

Date 03/07/2000

Institution Number 099999
WE'RE THE BEST COMMUNITY COLLEGE
123 MAIN STREET
ANY CITY DC 12345

JOHN DOE
123 MAIN ST
DISNEY WORLD FL 12345

Student ID: 555555555 DO 00 02

Dear Student,

Based on the information you provided, the Financial Aid Office is pleased to notify you of the following financial aid award(s) to help you finance your education.

BUDGET		EFC		UNMET NEED		AWARDED FUNDS		REMAINING NEED
$15,730	-	3,100	=	$12,630	-	$15,730	=	$0

		FULL TIME	FULL TIME	
TYPE OF AID	Decline?	FALL	SPRING	TOTALS
************************	********	********	********	******
FEDERAL WORK-STUDY	[]	$ 1250	$ 1250	$ 2500
INST NEED GRANT/ON CAMPUS	[]	$ 1250	$ 1250	$ 2500
INST NEED/OFF CAMPUS	[]	$ 750	$ 750	$ 1500
PLUS PARENT LOAN	[]	$ 2053	$ 2052	$ 4105
FEDERAL SEOG	[]	$ 500	$ 500	$ 1000
STATE GRANT	[]	$ 750	$ 750	$ 1500
SUBSIDIZED STAFFORD LOAN	[]	$ 1313	$ 1312	$ 2625

TOTAL AWARDED FUNDS $15730

You do not need to return this letter if you accept the conditions of the award. If you wish to decline any of the awards, check the box next to the award, sign below and return this agreement to the address listed above. If you decide not to attend, your written notification to us voids this award.

SIGNATURE ______________________________ DATE ______________

FINANCIAL AID AWARD OFFER
2000-2001 AWARD YEAR

Date 03/07/2000

RETURN THIS FORM BY: 05/01/2000 TO:

Institution Number 099999
WE'RE THE BEST COMMUNITY COLLEGE
123 MAIN STREET
ANY CITY DC 12345

JOHN DOE
123 MAIN ST
DISNEY WORLD FL 12345

Student ID: 555555555 DO 00 01

Dear Student,

Based on the information you provided, the Financial Aid Office is pleased to offer you this financial aid award to help you finance your education.

BUDGET		EFC		UNMET NEED		AWARDED FUNDS		REMAINING NEED
$15,730	-	3,100	=	$12,630	-	$15,730	=	$0

TYPE OF AID	Decline?	FULL TIME FALL	FULL TIME SPRING	TOTALS
************************	********	********	********	******
FEDERAL WORK-STUDY	[]	$ 1250	$ 1250	$ 2500
INST NEED GRANT/ON CAMPUS	[]	$ 1250	$ 1250	$ 2500
INST NEED/OFF CAMPUS	[]	$ 750	$ 750	$ 1500
PLUS PARENT LOAN	[]	$ 2053	$ 2052	$ 4105
FEDERAL SEOG	[]	$ 500	$ 500	$ 1000
STATE GRANT	[]	$ 750	$ 750	$ 1500
SUBSIDIZED STAFFORD LOAN	[]	$ 1313	$ 1312	$ 2625
TOTAL AWARDED FUNDS				$15730

Please sign below and return this agreement by the date at the top of this letter if you wish to accept this award. If you wish to decline an award, simply indicate by checking the box next to the award. Your signature on this document certifies you have carefully read and understand the information contained within. If you decide not to attend, your written notification to us voids this award.

SIGNATURE ______________________________ DATE ______________